
Snohomish County Tourism Plan

Prepared by: Frause, Berk & Associates, Calyx Sustainable Tourism, and Site Story
Fall 2010



Snohomish County
Executive Office
Economic Development Division

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INTRODUCTION

The Snohomish County Tourism Strategic 2010 Plan (Plan) is a roadmap to help move Snohomish County forward over the next five years to harness its true tourism potential. The Frause team was tasked with developing a Plan to guide tourism actions and investments by Snohomish County, the Snohomish County Tourism Bureau, and the multitude of tourism partners/stakeholders across the County. The list of stakeholders includes tribes, cities and towns, and ports, as well as many user and affinity groups.

This Plan – and the related goals and strategies - is the result of the Frause team’s extensive conversation with stakeholders and the Snohomish County leadership. The planning process used to develop this final document was open and transparent, with stakeholders encouraged to provide their good ideas and frank input.

While no process can be perfect, two key elements of the Plan development process included garnering feedback from a wide range of stakeholders and listening thoughtfully to the stakeholders. Another element was to ensure that all Plan recommendations utilized the tourism assets that are already available in Snohomish County so as to create a realistic and achievable Plan.

It is important to highlight that the Plan was developed during an economically challenging time, both for Snohomish County and for stakeholders in the public, private, and non-profit sectors. To help anticipate financial and time commitments required in implementation, the Plan includes recommended phasing. Strategies in the early years are intended to ensure a smooth transition towards the fulfillment of this newly focused tourism strategy.

The factors outlined below are important in context to the Plan and its strategic direction. These factors include a snapshot of the current Snohomish County tourism industry, prioritization of overnight visitors versus day trippers, the role of tourism in economic development, the characteristics of a highly functioning tourism system, and the value of diverse assets.

Tourism Industry Snapshot

As part of the Plan development process, the Frause team considered the current status of the tourism market in the County. Available data indicates that Snohomish County has the third largest tourism market in Washington State today. The County employed 14,545 workers in 2009¹ and attracted \$911.6 million in visitor spending in 2008. Since the writing of the *Strategic Plan for Tourism Development and Marketing* in 2000, visitor spending in Snohomish County has grown by 28 percent². This growth was accomplished through a concerted effort by the County and its many tourism partners. An assertion made in 2000 remains true today: “Tourism in Snohomish County should continue to grow as an industry and has clearly not reached its tourism potential.” This Plan seeks to continue the growth of the County’s tourism industry by building upon the current strengths as well as the many investments made through the implementation of the previous tourism plan developed in 2000.

Overnight Visitors and Day Trippers

The Plan addresses both leisure visitors and business- and event-based visitors who come from outside of the County. Visitors may come from a nearby county or from another state or province in the Northwest. Or, they may come from elsewhere in the United States or from another country. They may stay a few hours, a few days, or

¹ Tourism employment estimates used in this document define the tourism industry according to standards established by the Prosperity Partnership. Analysis done by Dean Runyan Associates uses a different definition of the industry and so reports somewhat different figures.

² From \$710.9 million (in 2009 dollars) in 2000 to \$911.6 million in 2009.

longer. While all of these visitors are valuable, there is an important economic difference between visitors who stay overnight and “day trippers” who do not. According to 2009 data, an average travel party (not individual travelers) that stays overnight in Washington spends an average of \$716 per trip, while a party that does not stay overnight contributes only \$222 to the local economy³.

Because of this significant difference in the economic development value of overnight and day visitors, the overarching focus of this Plan is to generate additional overnight stays, and to encourage overnight travelers to stay longer, experience more, and come back to Snohomish County.

Much of the Plan focuses on cross-promotion between experiences. It creates compelling, yet convenient, ways for visitors to see more than the main attractions that inspired their visit. This focus of the Plan also serves to strengthen attractions for regional day travelers visiting Snohomish County.

Tourism is Economic Development

This Plan builds on the idea that tourism is an important industry to Snohomish County due to its role in supporting – and growing - the local economy.

The tourism industry represented approximately six percent of the County’s total employment in 2009 and paid more than \$335 million in total wages in 2008. Tourism jobs are valuable because they provide employment opportunities for many early in their career. Some will advance up the career ladder in tourism, moving from entry-level service positions to higher-paying jobs while others will build on the skills and experience they gain in the tourism sector to branch out into other sectors.

By definition, tourism is about bringing outside visitors into an area and is an important source of wealth creation. Tourism brings in dollars that would otherwise never enter the local economy. In Snohomish County, visitors who spend money at tourist attractions, restaurants, overnight accommodations, gas stations, and other related suppliers of tourism-related goods or services bring new dollars to the area. Many of these dollars get circulated within Snohomish County’s economy, leading to additional jobs and income for residents.

Appendix C presents information about Snohomish County’s tourism industry, including employment (by sector), wages, visitor spending, lodging trends, and an examination of which tourism sectors are growing or shrinking, as well as those that are relatively stronger or weaker than national and regional averages.

Many tourism investments and attractions serve double-duty. They work to attract and serve visitors and they contribute to the quality of life for Snohomish County residents. The tourism industry creates richer cultural and artistic opportunities, more varied dining options, and a greater range of leisure and recreation activities for those who call Snohomish County home. These investments not only improve quality of life, they also contribute to the positive perception of Snohomish County, helping create an attractive image for the area.

Highly-Functioning Tourism System

The previous plan took important steps in strengthening Snohomish County’s tourism industry. Implementation of the previous plan strategies guided investment in the Future of Flight, Everett Memorial Stadium, and the Lynnwood Convention Center. It strengthened the roles of the Snohomish County Tourism Bureau and the Lodging Tax Advisory Committee, which oversees the administration of lodging tax funds. The strategies also contributed to an understanding of the importance of the tourism industry and helped shape the many collaborative efforts undertaken in the decade since plan adoption to strengthen the industry.

³ Dean Runyan Associates, Washington State Travel Impacts, 1991-2009

The 2010 Plan builds on the successes of the previous plan, establishes strategies to build on the strengths of Snohomish County and addresses its gaps and challenges. As a result of this multi-tiered approach, Snohomish County will continue to grow as a highly functioning tourism system. At the end of 2015, this tourism system should include:

- strong assets that attract visitors to Snohomish County and encourage them to stay longer, explore more, and return often;
- a brand and image that builds on County strengths in a genuine and powerful way;
- effective marketing and promotion efforts, including a network of cross-promotions that include itineraries, maps and packages;
- strong supporting infrastructure and services, including overnight accommodations, restaurants, wayfinding, and signage; and
- a collaborative and coordinated network of partners in the public, private, and non-profit sectors working together to strengthen the County's tourism market for the benefit of all.

Diverse Tourism Assets

One of the foundational needs of the Plan development process was an analysis of tourism assets in Snohomish County, as well as an assessment of stakeholder's opinions of these assets. This analysis required the Frause team to develop a full understanding of the existing attractions, hidden assets, and potential visitor draws.

The Frause team determined that there is an abundance of diverse tourism assets in Snohomish County, but not all stakeholders fully understand what is available or how these assets could, or should, be promoted. Throughout the Plan feedback process, stakeholders defined Snohomish County's current tourism assets rather narrowly, focusing on attractions similar to their own area of focus.

At the same time, tourism stakeholders who were aware of the diversity of attractions believed that promotion of the list of tourism assets is limited. The Frause team contends that this lack of awareness and the limited promotion creates an opportunity to build and highlight the abundant network of attractions.

Appendices A and B
summarize
stakeholder input and
Appendices E and F
summarize Snohomish
County's tourism
assets in more detail.

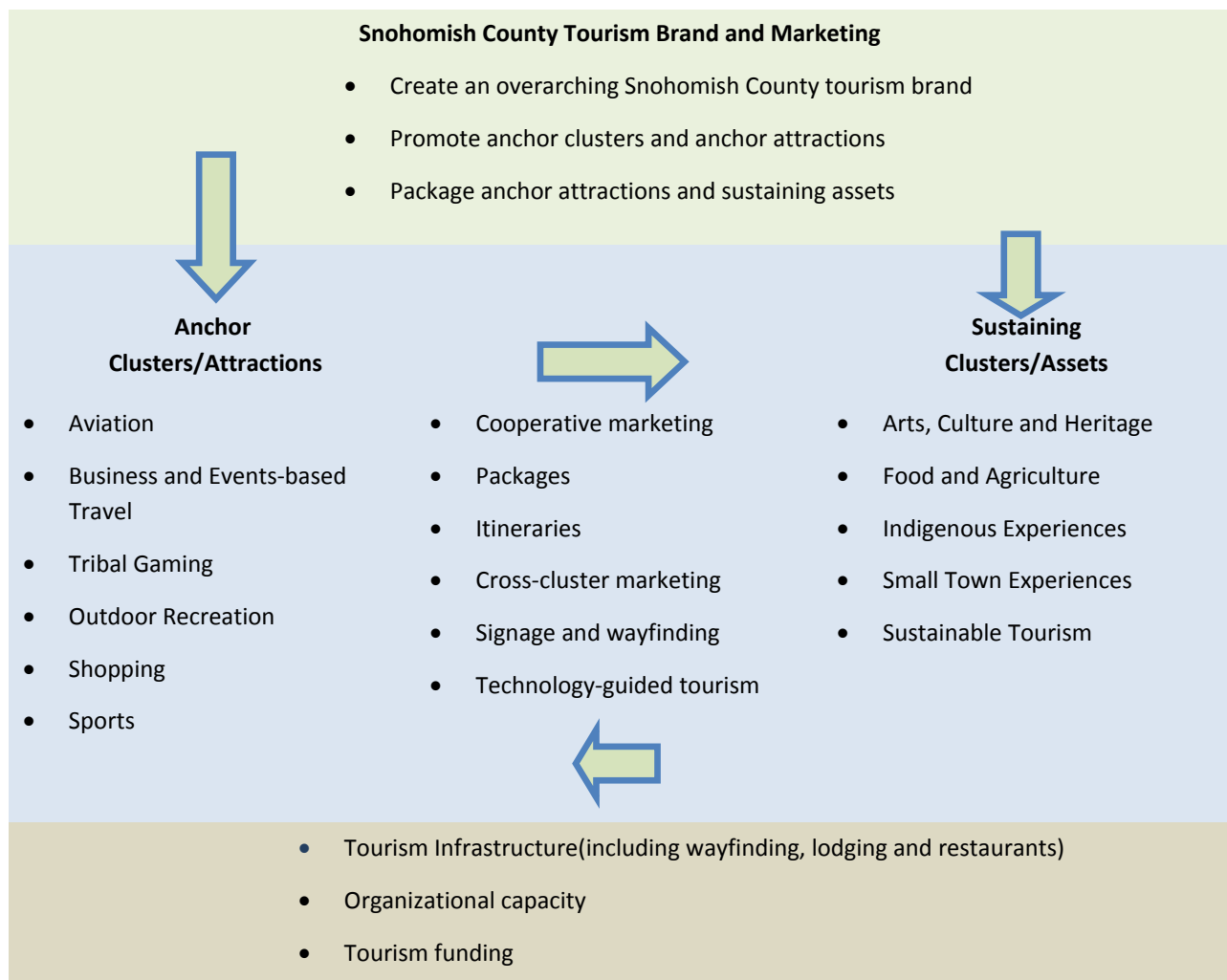
THE STRATEGIC APPROACH

Snohomish County has a diverse breadth and depth of tourism attractions and assets, ranging from urban to rural. The long list of attractions and assets includes everything from active recreation and cultural enrichment to shopping and leisure travel. The list also includes business- and event-oriented travel.

The Plan builds on those many strengths in a focused and strategic way, targeting limited resources to make the greatest impact. The foundational direction for the Plan is to focus visitor attention towards “anchor clusters” and “anchor attractions,” while working to enhance – and extend - the visitor experience through “sustaining clusters” and “sustaining assets.”

This strategic approach begins with the creation of an overarching Snohomish County tourism brand and it focuses promotional efforts around anchor clusters and anchor attractions. The inter-related promotion of anchor and sustaining clusters is aided by cooperative marketing, maps, packages, promotions, signage and technology-guided tourism. To support this approach, the Plan outlines the need for an improved tourism infrastructure, greater organizational capacity, and refined tourism funding. To maximize promotion and the natural travel routines of travelers, the Plan divides Snohomish County into Tourism Exploration Zones that build on geography.

Strategy At-A-Glance



Anchor and Sustaining Descriptions

Anchor clusters and anchor attractions were identified by the Frause team through stakeholder meetings, surveys, workshops, and individual interviews. These survey techniques revealed those assets for which Snohomish County is best known, as well as the most popular tourism draws. The Frause team defines anchor clusters and anchor attractions as those that are intrinsically strong enough to attract large numbers of people from outside Snohomish County and those that have built in marketing infrastructure programs.

The list of anchor clusters includes:

- Aviation
- Business and Events-based Travel
- Tribal Gaming
- Outdoor Recreation (includes nature-based tourism, adventure tourism, and active and leisurely adventures)
- Shopping
- Sports

Sustaining clusters and sustaining assets constitute a compelling fabric of additional places to visit, restaurants to try, and experiences to sample. These clusters and assets are those activities that make Snohomish County such a plentiful and vibrant place to live in as well as visit. The sustaining clusters and sustaining assets are the reasons to stay longer, explore off-the-beaten path, and experience Snohomish County in a deeper way.

The County's sustaining assets are perhaps even stronger than its anchor attractions – but they do not currently have the drawing power to get someone to come to Snohomish County on their own. However, some of those clusters and attractions designated as sustaining in this Plan may well evolve into future anchor attractions as they draw more attention and as their marketing capacity grows. This would be a great success.

The list of sustaining clusters includes:

- Arts, Culture, and Heritage
- Food and Agriculture
- Indigenous Experiences
- Small Town Experiences
- Sustainable Activities

Hidden Assets Identified

Hidden assets were the third category of tourism assets identified. Hidden assets are not as well known and are more closely connected with community life than categorized as “tourism assets.” When visitors discover these assets, they offer insights into the greater depth and richness of the host communities.

The Frause team's hidden assets analysis is the result of a growing trend to identify those places, people, culture, and activities that one would consider authentic. When visitors explore new communities and places, they seek experiences that are unique to the place they are visiting. The Frause team supports the idea that visitors look for opportunities to meet “the locals,” see chances to discover history and culture, and are drawn to experiences.

Through the hidden asset analysis, the Frause team identified a few hundred “new” assets. The analysis revealed a number of cultural, natural resource, and sustainability events that would never surface through a conventional tourism assessment. The integration of these hidden assets with the more significant attractions and assets has many benefits. Beyond building respect for the communities where tourism occurs, these benefits include:

- Deepening and creating more authentic visitor experiences.
- Bridging business travel with leisure travel.
- Creating additional funding streams for tourism, such as Preserve America grants or Heritage Tourism funds.
- Improving the financial success of small towns and natural resource assets.
- Expanding the overall market for tourism by bringing in new visitors.
- Linking current and new residents to the history and culture of the area.
- Leveraging local residents as tourism ambassadors for visiting friends and relatives.

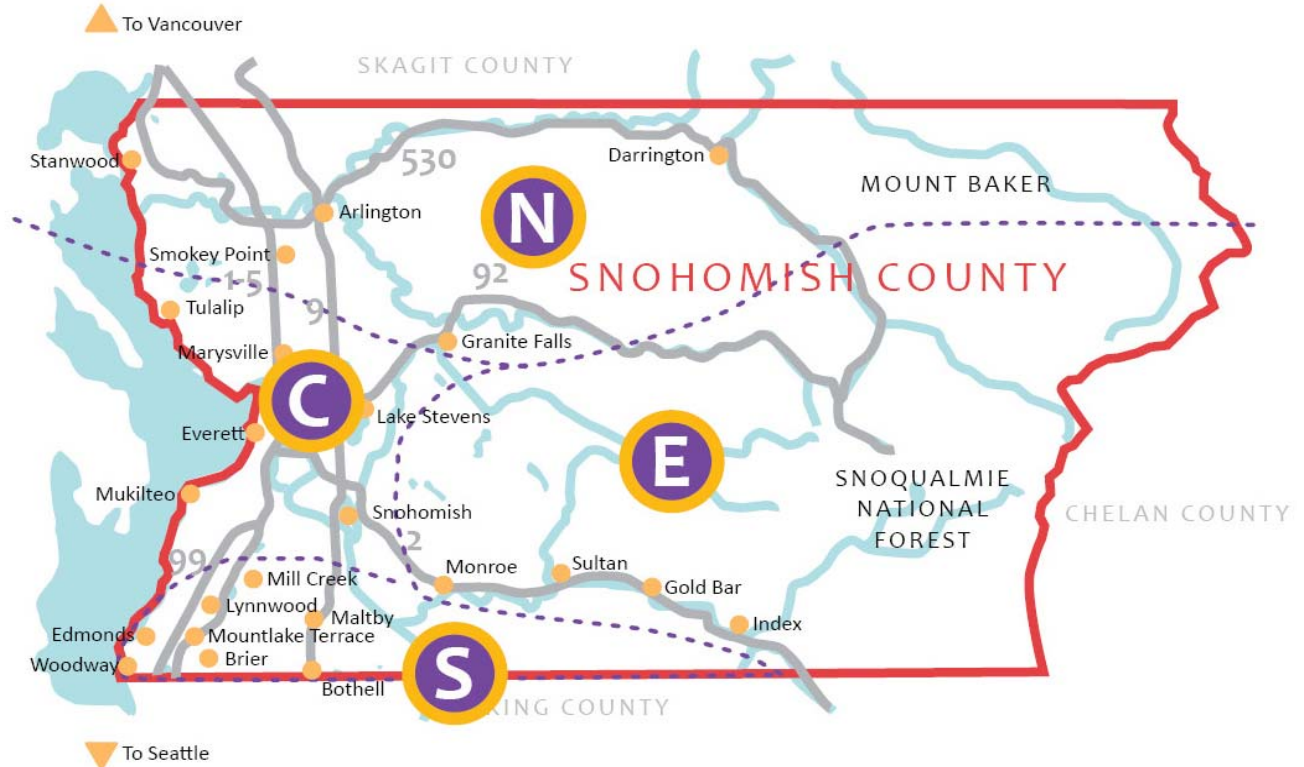
Tourism Exploration Zones

A core part of the fundamental strategy for the Plan is the development of Tourism Exploration Zones. These Zones create promotions and packages from a diverse list of attractions and assets within a certain geographic area. The creation of Zones help guide visitors to find out instantly what their travel options are *relative to where they are* in Snohomish County – whether North, Central, East or South.

The Frause team believes the Zones are necessary because of the vast size of Snohomish County and because the creation of zones makes it easier to develop promotions and package that don’t require extensive driving or travel. The Zones would allow itineraries - rich with anchor attractions, sustaining clusters and hidden assets - to be easily developed. These itineraries would allow people to experience more of the area with the least amount of effort. Itineraries could also be developed that include multiple Zones. This idea is not intended to exclude or create division between cities or communities. Instead, the Zones would aid visitors in getting more out of their trip.

The Zones idea is based on a movement that started with the *Access Travel Guides*. These guides to cities revolutionized travel books because they promote assets based on geography. This approach reverses the unfortunate tendency to group hotels in one list, restaurants in another, and museums in a third. Categorical asset lists are not practical to the visitor who has some extra time and is interested in extending their visit. What visitors want to know is what they can do, where they can eat, and even where they can stay *close to where they are* at the moment. Categorical lists are a handy reference tool but are not as effective in planning an itinerary or giving guidance in the moment. Zones could also become an effective tool for drawing visitors into parts of the Snohomish County that they might not otherwise visit. The Frause team advocates that all Snohomish County stakeholders from each Zone join in the package and promotion development effort.

Tourism Exploration Zones At-A-Glance



TOURISM EXPLORATION ZONES

- N North** | Arlington, Darrington, Granite Falls, Stanwood
- C Central** | Everett, Mukilteo, Lake Stevens, Snohomish, Marysville, Tulalip
- E East** | Monroe, Gold Bar, Sultan, Index
- S South** | Bothell, Mill Creek, Lynnwood, Mountlake Terrace, Edmonds, (Brier, Woodway)

Overview of Goals and Strategies

I. Stronger Tourism Brand and Marketing Strategy

1. Repackage the County's brand into an accessible adventure destination.
2. Develop strong cross-promotional marketing to encourage visitors to experience sustaining clusters.
3. Develop the capacity to better promote hidden assets.
4. Have fun and engage people in surprising ways.

II. Anchor Clusters and Anchor Attractions Focus with Strong Cross-Promotional Efforts

5. Expand the convention and meeting booking function of the Snohomish County Tourism Bureau.
6. Strengthen the aviation cluster and knit it to the broader network of tourism assets and services.
7. Build on the County's strengths in tribal gaming.
8. Leverage the County's considerable outdoor recreation assets.
9. Promote and support the County's diverse shopping options.
10. Continue to build the County's organized sports market.

III. Rich Network of Sustaining Clusters and Sustaining Assets

11. Strengthen the County's sustaining tourism clusters through collaboration.
12. Identify sustainable tourism opportunities.

IV. Stronger County Tourism Infrastructure

13. Improve the Tourism Bureau website and develop custom and prepackaged itineraries.
14. Update approach to putting information in visitors' hands.
15. Improve wayfinding and support the serendipity of discovery.
16. Improve public transportation options to enhance access to tourism assets.
17. Broaden the County's range of overnight options.

V. Enhanced Organizational Capacity

18. Strengthen the County's ability to coordinate tourism efforts and implement the Plan.
19. Use data to strengthen tourism promotion and development efforts.
20. Broaden and enrich the conversation between the County and stakeholders.
21. Build stronger partnerships with the tribes.
22. Support professional development for the County's tourism workforce.

VI. Tourism Funding Resources Align with Strategic Goals

23. Leverage the lodging tax effectively to advance tourism
24. Support the emerging Tourism Promotion Area.

Implementation

This Plan establishes what Snohomish County and its tourism partners should tackle to expand countywide tourism between 2011 and 2015. The strategic approach is articulated as a general philosophy and is built out into six goals and 25 supporting strategies. Implementation is outlined to a degree, but more work is necessary to bridge strategy and implementation. That work will be accomplished by the Snohomish County Economic Development Division, acting as the primary steward of this Plan, in collaboration with the Snohomish County Tourism Bureau. Other partners and stakeholders should be involved as well. This added element of collaboration is important because a collective effort is required for success and because implementation will require the use of shared resources.

Additional support. The Plan identifies the need to strengthen the ability of Snohomish County and the Snohomish County Tourism Bureau to implement the ambitious goals and strategies. The addition of a new, full-time tourism position is recommended within the Snohomish County Economic Development Division. ***The accomplishment of many strategies throughout this document will rely on this additional resource. It is not possible to implement this Plan without an additional staff person within the Snohomish County Economic Development Division.***

In addition to this staff position at the County, the resources of the Snohomish County Tourism Bureau must be aligned with the philosophy, goals, and strategies contained in this Plan. An additional assessment effort is needed to evaluate the Snohomish County Tourism Bureau's current work plan and to make the adjustments necessary to focus the organization on this Plan. This assessment should evaluate whether the Bureau's role as described in this Plan can be accomplished with existing staff resources or if additional staffing is needed. Some translation will be required as some items from this Plan are already incorporated into the Snohomish County Tourism Bureau's annual work plan. Additional specificity may be needed, and – as with other items on its workplan – they should be incorporated to make the Bureau's responsibilities clear and its performance easily evaluated.

Leads and partners. This Plan identifies leads and primary partners responsible for advancing each strategy. Rather than assign responsibilities to parties who have not been part of the planning process, this Plan recommends some potential partners. It is important to note that the designated lead is not always the primary agency or organization that will work to accomplish a strategy. In such cases, the lead would be responsible for advancing the cause and cultivating the support of other partners needed to successfully implement this Plan.

Funding resources. This Plan contains basic estimates of the resources that will be required for implementation, including both funding needs and staff resources. These are preliminary estimates and implementation planning will require a more detailed assessment of both costs and potential funding sources. The Frause team anticipates that the Snohomish County Lodging Tax "Large Fund" will be the primary funding source for most of the investments recommended in this Plan, with funding approval required by the Snohomish County Lodging Tax Advisory Committee.

Appendix C
summarizes the
funding streams
available to support
tourism promotion in
Snohomish County.

The Large Fund has traditionally been a source of funds for investment in capital projects that attract tourists to Snohomish County. The County has been well-served by these strategic investments and now has a much stronger asset base with which to attract and satisfy visitors. It is only appropriate that Large Fund revenues now be directed to the County's current needs: developing and promoting a County brand; engaging in cross-promotional marketing that encourage visitors to visit the County's anchor attractions (including many Large Fund-supported attractions) and to deepen their exploration through sustaining assets; and augmenting the infrastructure required to move the visitors around, such as signage, wayfinding, and attractive gateways.

Measuring success. It is critical that implementation of this Plan include ongoing monitoring and communication of progress. As an aggregate measure, Dean Runyan's calculation of total tourism spending provides an externally generated statistic to track. The 2000 plan set the goal of \$1 billion in annual spending by 2010. The County reached just over \$900 million in 2008, after growing by an annual average growth rate of three percent from 2000 to 2008. This measure is a useful one to track, but subject to too many variables to serve as a single measure of success for the County's tourism promotion efforts. As this overall strategic approach is adopted and an implementation plan is developed, appropriate performance measures should also be adopted. The use of output measures can be an efficient way to ensure that the desired level of effort is being made.

Recommended performance measurements for this Plan include increases in the following categories:

- overnight stays
- meetings and events
- unique website visitors
- downloaded materials
- cross-promotional results
- involved stakeholders

The final work plan developed by Snohomish County Economic Development Division, in cooperation with the Snohomish County Tourism Bureau, should determine the numeric metrics attached to these categories. The need to increase the availability of data to evaluate these areas of interest is addressed in the Plan.

GOALS, STRATEGIES, AND TASKS

I. Stronger Tourism Brand and Marketing Strategy

1. Repackage the Snohomish County brand into an accessible adventure destination.

Rationale. In the competitive tourism world, location branding can make or break a destination. In the case of Snohomish County, the current brand image does not match the brand identity, or what Snohomish County actually is able to provide in terms of tourism offerings. Currently, the existing brand tries to be everything to everyone, which is not a wise strategy. As a result, Snohomish County is not identifiable as a leisure or business traveler destination.

Approach. Create a tighter and more identifiable brand that reflects the County's anchor attractions with a blend of sustaining assets. Consider the concept of accessible adventure. Accessible adventure is a common thread that runs through everything the County has to offer as a tourist destination. For example, Snohomish County offers a wide range of adventures to experience. The wide range of adventures includes some that are more active and strenuous, such as rock climbing, diving, and challenging treks, while others are more relaxed, such as kayaking, hiking, shopping, or exploring a small town. Within these experiences, there are adventures that inspire discovery, such as cooking classes, museums, and the theater. These adventures are not impossible, but instead are accessible. They are also exciting and rewarding enough to motivate visitors to come back and further explore the many adventures within the County. When considering adventure, care should be taken to understand that adventures in Snohomish County range from the strenuous to the more sedate. It is important to not discourage the non-athletic person from visiting. Accessible adventure is a theme that could turn into a solid brand identity for the County.

Tasks.

- i. **Launch a multi-year brand initiative with an eye to the adventure theme.** Use a collaborative branding initiative to update the County's brand so that it focuses in on genuine strengths and represents the real diversity of the County. This initiative would include a review of current data, qualitative research work, and quantitative research, as well as a creative development process. A core component of the branding initiative would be a stakeholder input process that would invite comments and input. Within the collaborative branding initiative, messaging would be developed to promote the anchor clusters and anchor attractions based on branding data analysis. With the messaging and the creative options developed, focus groups would be conducted to garner input on the creative concepts and messaging. With this information in hand, final creative would be selected and finalized for use in marketing materials.

Lead Snohomish County Tourism Bureau with oversight from Snohomish County Economic Development Division

Timeline 2011 Collaborative Branding Initiative
2012 Branding Implementation
2013 Partner Cooperative Marketing Design Implementation
2014 Partner Cooperative Marketing Design Implementation
2015 Partner Cooperative Marketing Design Implementation

Resources Staff resources, plus expenses of \$150,000 in 2011 and \$25,000 in subsequent years

2. Develop strong cross-promotional marketing to encourage visitors to experience anchor clusters, anchor attractions, sustaining clusters and sustaining assets.

Rationale. With limited resources and a large pool of assets, it makes great sense to find ways to link larger anchor attractions with sustaining assets through cross-promotional marketing efforts. This is particularly true for a community such as Snohomish County, which faces strong competition for visitors' attention from Seattle, Vancouver, and other nearby attractions. The County's anchor attractions will draw visitors to Snohomish County, and effective cross-promotions will keep them here and diversify their experiences.

Approach. Find innovative ways to organize and promote attractions and assets. Use cross-promotion to enliven and extend the visitor experience as well as facilitate cross-sector collaboration and help industries think beyond their own cluster.

Tasks.

- i. **Establish clear points of contact for specific issues.** Make it easy for stakeholders to know who to contact at Snohomish County and at the Snohomish County Tourism Bureau regarding promotion. Municipalities in each Tourism Exploration Zone should assign a point of contact to work directly with each respective community and with the Snohomish County Tourism Bureau to help bolster partnerships and the effectiveness of cross promotional efforts.

Lead Snohomish County Economic Development Division with support from the Snohomish County Tourism Bureau

Timeline 2011

Resources Staff resources

- ii. **Share information between stakeholders.** Create an online directory of tourism stakeholders to support the easy sharing of information and referrals.

Lead Snohomish County Tourism Bureau

Timeline 2011

Resources Staff resources, plus \$500 a year in expenses

- iii. **Familiarize tourism stakeholders with attractions and assets.** Help staff of hotels, restaurants, and other services understand area attractions and assets. Consider simple ways to educate tourism stakeholders, such as:

- organize regular familiarization tours;
- schedule regular networking events;
- facilitate attraction or asset tickets discounts;
- conduct on-line quizzes;
- facilitate stakeholder roundtables; and
- develop presentations for different groups.

Lead Snohomish County Tourism Bureau

Timeline Ongoing

Resources Staff resources, plus in-kind expenses from stakeholders

- iv. **Develop a system of itineraries, maps, promotions and packages that promote the diverse variety of assets.** Create a systematic approach to developing visitor-inspiring itineraries, maps, promotions and packages that can be implemented throughout the entire tourism promotion process. Develop a branding campaign templates for itineraries, maps, promotions, and packages, then develop an internal system that encourages stakeholders to submit ideas. *NOTE: The look and feel of the designed template would match the branding re-design.* The itineraries, maps, promotions and packages would intertwine the GIS and Smart Phone applications.

Lead Snohomish County Tourism Bureau
Timeline 2012
Resources Staff resources, plus \$50,000 in expenses

- v. **Work with tour operators to expand existing tours.** This can include arranging for visitors to experience sustaining clusters and assets in addition to anchor attractions. Examples include adding elements to the Boeing Tour, Events-based activities and the Imagine Children's Museum, such as:

- combining waterfront dining and a Downtown Everett walking tour with the Boeing Tour;
- adding a small town shopping experience to a local convention; and
- supplementing an Imagine Children's Museum package with an indigenous experience.

Lead Snohomish County Tourism Bureau
Timeline 2012
Resources Staff resources

- vi. **Organize the Tourism Exploration Zones and outline Zone cross-promotions.** Beyond filling out the details of the Tourism Exploration Zones, this task aims to develop itineraries, maps, packages and promotions to leverage all assets and encourages visitors to spend more time within a Zone.

Lead Snohomish County Tourism Bureau
Timeline 2012
Resources Staff resources, plus \$20,000 in expenses

3. Develop the capacity to better promote hidden assets within the County.

Rationale. Given the County's considerable hidden assets, more work should be done to define and promote these draws, as well as fully integrate them into the County's tourism network.

Tasks.

- i. **Host Zone branding workshops.** Develop annual workshops for each Zone so that tourism stakeholders – especially those who represent hidden assets – can come together to identify itineraries, maps, packages and promotions that facilitate cross-marketing pollination. Post outcomes of each Zone workshop in a final report.

Lead Snohomish County Tourism Bureau
Timeline 2012
Resources Staff resources, plus \$20,000 a year in expenses (\$5,000 per Zone)

4. Have fun and engage people in surprising ways.

Rationale. Developing creative ways to make people stop, ponder, and get excited about an adventure is the best way to encourage their involvement. By highlighting accessible adventures in creative ways, the Snohomish County brand can come alive.

Approach. Develop a cadre of ambassadors dressed in place-based costume who can promote the adventure brand in the community. Locate the ambassadors strategically, yet out of place: a fisherman with hip waders on a main street; a chef on the Skykomish River's banks; an aviator on a hiking trail or a ferry; a giant fish in a Visitor Information Center or at SeaTac airport; or, a kiteboarder at an art museum. Supply ambassador volunteers with mobile technologies to access maps, trails, and other business information on Snohomish County Tourism Bureau website. Utilize volunteers to conduct intercept interviews to assess what visitor draws and to determine their needs.

Tasks

- i. **Develop a pilot test of the ambassador program.** This program would utilize staff and volunteers, and would draw on creative sources such as work-study and performing arts programs.

Lead Snohomish County Tourism Bureau
Timeline 2013
Resources Staff resources, plus \$35,000 in expenses

- ii. **Sponsor "Art in Nature" and "Nature in Art" installations and events.** Work with Boeing and other aviation asset managers to facilitate and frame cross-promotion of nature and art offerings in the County with aviation.

Lead Snohomish County Economic Development Division
Timeline 2013
Resources Staff resources

Sample Itineraries	
Clusters	Potential Activities
Anchor Clusters	
Aviation	Local history, industry, and innovation
Tribal Gaming	Gaming itinerary that links visitors to the County's tribal gaming attractions with related sustaining assets (work with Tulalip Tribe, Naval Station in Everett, and the Port of Everett Marina)
Outdoor Recreation	County's Top 10, such as hiking trails, secrete fishing spots, climbing locations, camping experiences and shoreline recreation
Shopping	Itineraries that focus on major shopping destinations or small town shopping experiences, or a mix of the two
Sports	Integrated sports itineraries linking visiting athletes with other sporting events and opportunities, as well as outdoor recreation and local food
Sustaining Clusters	
Arts, Culture and Heritage	Art gallery or art studio tours Maritime heritage tour Youth engagement art experiences Events at the Evergreen Fairgrounds
Food and Agriculture	"Agriculinary" itineraries combining on-farm visits with shopping tours at farmer's markets, fishing lessons, edible garden development, and cooking classes Culinary, farm, and wine/distilled spirit assets in an integrated food tour that incorporates elements of salmon habitat protection and farm communities
Indigenous Experiences	Salmon trails (linking places where salmon spawn to Native American sites to Salmon Safe farms) Indigenous peoples experiences with the Sauk Suiattle, Stillaguamish, and Tulalip tribes
Small Town Experiences	Snohomish city tour combined with aviation tour
Sustainable Tourism	Electric car tour of the Scenic Highway Loop Forest Stewardship Council Forest Tour in timber dependent communities

II. Anchor Clusters and Anchor Attraction Focus with Strong Cross-Promotional Efforts

5. Expand the convention and meeting booking function of the Snohomish County Tourism Bureau.

Rationale. Business travelers are a significant portion of Snohomish County tourism now, and they represent a large potential market opportunity. Visitors attending multiple-day events are very likely to overnight in Snohomish County and may be encouraged to broaden and extend their stay, providing additional business to the County's many tourism assets and services.

Approach. If market feasibility studies are positive, provide centralized sales and marketing support through an expanded convention bureau function. Focus on realistic niches given the attributes of the County's facilities, such as the "SMERF" (Social, Military, Educational, Religious, and Fraternal) market.

Tasks.

- i. **Develop a business plan that addresses meeting and event services of the Snohomish County Tourism Bureau.** Conduct a business planning process around the idea of expanding the promotion and booking of meetings and events at participating Snohomish County meeting facilities. Determine the services to be provided, the related staffing requirements, and service funding (funding by the County and/or participating meeting facilities). One important service could be to work with meeting and event planners to extend meetings by one day, thus improving access to sustaining assets.

Lead	Snohomish County Economic Development Division
Partners	Snohomish County Tourism Bureau, convention and meeting facility leaders
Timeline	2011
Resources	Staff resources, plus \$30,000 in expenses

- ii. **Support efforts by local communities and facilities to address infrastructure gaps.** Snohomish County's current meeting facilities require additional infrastructure to help them be successful. A task force of County, city, public facilities district, and tribal partners should be formed to address these challenges, including siting appropriate lodging venues; building transportation linkages among convention facilities, and improving lodging facilities. The task force should also discuss enhancing the gateway appeal of the area around the facility and roads leading to the area.

Lead	Snohomish County Economic Development Division
Partners	Affected tribes, cities, and public facilities districts
Timeline	2012 and then ongoing
Resources	Additional County staffing resources

- iii. **Facilitate the provision of better services provided by existing hotels.** Work with the hotels that support Snohomish County's meeting facilities to provide a better level of services, such as concierge service, lobby events, art installations, special gifts, or special transportation offerings.

Lead	Snohomish County Tourism Bureau
Partners	Snohomish County Lodging Association; hotel owners and managers
Timeline	2011 and then ongoing
Resources	Staff resources

6. Strengthen the aviation cluster and knit it to the broader network of sustaining assets.

Rationale. The Boeing brand is the number one anchor attraction that draws people from outside the area. The additional aviation attractions are a natural support of the Boeing Tour and can easily be enhanced and expanded based on the comments and interest of the aviation attraction owners. The marketing power and existing collaboration within the attractions make the cluster an obvious tourist priority that can ultimately help guide tourists to sustaining assets. There is great potential within this anchor cluster.

Approach. Work with stakeholders to develop a more cohesive aviation cluster in order to attract more tourists to the area, and then package the cluster with sustaining assets to drive tourists deeper into the County.

Tasks.

- i. **Facilitate the development of a stronger and more coordinated aviation cluster.** Develop an Aerospace and Aviation Tourism Destination Action Plan to include aviation attractions at Paine Field and elsewhere in the County. Stakeholders from aviation and aerospace attractions should help drive and participate in the process. The Plan should include the following: implementation of the proposed passport program; coordinated and cooperative marketing program; coordinated and collaboratively held events; and strong cross-promotional marketing strategies to link aviation visitors with other tourism opportunities in the County.

Lead	Snohomish County Economic Development Division
Partners	Aviation cluster participants
Timeline	Ongoing
Resources	Additional County staffing resources, plus \$25,000 in expenses

- ii. **Support the continued strengthening of the Future of Flight Aviation Center.** Encourage the Center to develop a comprehensive business planning document that better defines the organization's purpose and identifies realistic financial and marketing goals as well as establishes a tactical implementation plan for achieving those goals. The business plan should include the following:

- Purpose, goals, objectives and target audiences
- Meeting and events approach
- Sales and marketing goals
- Additional revenue opportunities
- Exhibits enhancements

Lead	Snohomish County Economic Development Division
Partners	Future of Flight Aviation Center
Timeline	Ongoing
Resources	Additional County staffing resources, plus \$50,000 in expenses

- iii. **Encourage tour operators and individuals visiting the aviation cluster to take in more of Snohomish County.** Consider placing a full Snohomish County Tourism-sponsored Visitor Information Center within the Future of Flight Aviation Center. Also create promotions and packages that encourage tour operators and visitors to support local restaurants, hotels, and related and unrelated assets such as hiking or kayaking.

Lead	Snohomish County Tourism Bureau
Partners	Future of Flight and aviation cluster stakeholders
Timeline	Ongoing
Resources	Staff resources, plus \$50,000 in expenses

7. Build on the County's strengths in tribal gaming.

Rationale. Tribal gaming is one of the County's strongest anchor attractions. This strength should be seen as a core aspect to the County's tourism assets and efforts should be taken to encourage gaming visitors to sample other attractions and assets.

Approach. While the County's tribal gaming assets are owned and operated by tribal and private enterprises, the County can assist in promoting a positive image for the industry and developing gaming-oriented itineraries that connects gaming visitors to other assets and attractions.

Tasks.

- i. **Link tribal casino visitors with other tourism attractions in the County.** Work with the tribal casinos and other gaming establishments to ensure casino visitors are aware of other attractions in the area, enriching their stay, and encouraging future visits. Thread the tribal gaming opportunities throughout the itineraries, packages and promotions.

Lead	Snohomish County Tourism Bureau
Partners	Tribes
Timeline	2012
Resources	Staff resources

8. Leverage the County's considerable outdoor recreation assets.

Rationale. The beauty and abundance of outdoor recreation assets in Snohomish present a tremendous opportunity. The extensive list of opportunities to enjoy the outdoors makes it hard for other jurisdictions to compete. The County can harness these opportunities by packaging the outdoor assets in a way that makes it easy for people to put their adventure together.

Refer to **Appendix F** for outdoor adventure and recreation recommendations.

Approach. Make existing outdoor assets and activities more accessible to visitors and encourage stakeholders to make longer-term investments in new outdoor recreation attractions.

Tasks.

- i. **Generate maps that highlight outdoor assets.** Work with communities to populate map templates with information about their local outdoor assets. Local communities may partner with walking clubs, public health, and affiliated non-profit organizations to include public transportation routes, bicycle routes, skate parks, and water trails in attractive maps highlighting these attractions.

Lead	Snohomish County Tourism Bureau
Partners	Local communities and related stakeholder groups
Timeline	2012 and 2013
Resources	Staff resources

- ii. **Develop a series of itineraries that feature small town outdoor adventures.** Work with community groups, affinity groups and other stakeholders to develop geographic-, time-, and interest-based itineraries for three hour, half day, full day, and multiple days stays in and around communities and small towns, and focus those itineraries on outdoor activities. Pay particular attention to small towns that have been historically underrepresented in tourism marketing such as Sky Valley, Mountain Loop Highway towns, and Western Snohomish County farm country. Use the itineraries template to create final documents to post online.

Lead	Snohomish County Tourism Bureau
Partners	Outdoor recreation stakeholders
Timeline	2013
Resources	Staff resources

- iii. **Develop wildlife viewing itineraries.** Coordinate itineraries that feature wildlife viewing areas encompassed by the Snohomish River Estuary, Edmonds Marsh, Port Susan Bay, and other areas identified on the Cascade Loop Birding Trail (Audubon Washington). Work with equipment providers, naturalist guides, smaller bus companies, and food/farming assets to create a full set of wildlife viewing experiences. Use the itineraries template to create final documents to post online.

Lead	Snohomish County Tourism Bureau
Partners	Local communities and stakeholder groups
Timeline	2013
Resources	Staff resources

- iv. **Develop water activity adventure itineraries.** Work with stakeholders to develop extensive itineraries that include stream, river, lake and Puget Sound water activities. Include clustered links for equipment, tide tables, fishing reports, places to eat and stay overnight, camp grounds, and Meet Up® groups that may be available. Work with the Washington Water Trails Association to help identify campgrounds for sea kayakers. Use the itineraries template to create final documents to post online.

Lead	Snohomish County Economic Development Division
Partners	Washington Water Trails Association and other stakeholders
Timeline	2015
Resources	Staff resources

- v. **Post outdoor activity-related links on the Snohomish County Tourism Bureau website.** Include links to local cycling, scuba, skiing, snowmobiling, and water sports businesses, as well as links to corollary services such as equipment, chat rooms, tide tables, information resources, and community-based clubs.

Lead	Snohomish County Tourism Bureau
Timeline	2012
Resources	Staff resources (expenses covered under website budget)

- vi. **Develop more biking options.** Work with the railroads to outline potential new bike trails along SR 530 and upland mountain bike trails near Darrington.

Lead Snohomish County Economic Development Division
Partners Local communities and stakeholder groups
Timeline 2013
Resources Additional County staffing resources

- vii. **Address user conflicts and access issues.** Work with user groups, the Washington State Department of Natural Resources, conflict resolution experts, and biologists to discuss and resolve user conflict and access issues around off-road vehicle trails, potential mountain biking, hunting and associated issues of salmon and trout health, watershed vitality, hiker safety and the cost of river cleanups. This will help to identify and inventory off-road vehicle and river access points while providing better contextual information for all types of land users.

Lead Snohomish County Economic Development Division
Partners Local communities and stakeholder groups
Timeline 2014
Resources Additional County staffing resources

9. Promote and support the County's diverse shopping options

Rationale. Shopping is a cornerstone activity in Snohomish County, which features both large-scale shopping opportunities such as Alderwood Mall and the Seattle Premium Outlets, as well as small town shopping experiences. Shopping easily leads to other activities, such as eating out, and, in the case of Canadian shoppers, contributes substantially to the County's overnight stays. The Snohomish County shopping options also include locally-owned boutiques, local product sellers, and niche category stores, such as furniture, and outdoor adventure gear. The diverse shopping experience is one that will keep people coming back to Snohomish County time and time again.

Approach. Build on the County's large draws and small town shopping experiences. Market the opportunities to Canadian and Seattle/King County populations in particular. A shopping-oriented itinerary should also be developed as shown on page 15.

Tasks.

- i. **Develop a suite of shopping itineraries.** Create easy-to-access shopping trips that can be done in blocks of three hours. Develop different itineraries for different types of experiences. Use the itineraries template to create final documents to post online.

Lead Snohomish County Tourism Bureau
Partners Retailers
Timeline 2012
Resources Staff resources

- ii. **Develop an annual shopping adventure promotion.** Using itineraries, create an adventure themed promotion that is supported through online advertising, such as Facebook ads, and radio ads. Drive all visitors to Snohomish County Tourism Bureau website.

Lead	Snohomish County Tourism Bureau
Timeline	2012 - 2015
Resources	\$50,000 annually

10. Continue to build the County's organized sporting events market.

Rationale. Tournament participants and their families present a large market opportunity for Snohomish County, with the potential to generate substantially more overnight stays and support for local restaurants and businesses. Efforts should also be taken to encourage these visitors to explore other Snohomish County attractions and experiences.

Approach. Strategies for growing the County's organized sports market include initially promoting the value of these events to local communities. Cities that host tournaments may incur direct costs in terms of staff time and other resources needed to prepare, light, and clean fields. Tournaments also reduce the availability of fields for use by local residents. These costs, however, may be more than offset by tax revenues generated and support for local businesses. Building on these awareness-raising efforts, support the work of the Snohomish County Sports Commission and sports infrastructure.

Tasks.

i. Coordinate efforts to fully fund and staff the Snohomish County Sports Commission.

Lead	Snohomish County Tourism Bureau
Timeline	2011
Resources	Staff resources, plus potential funding could come from the Tourism Promotion Area

- ii. Build support for the organized sports market.** Create and circulate up-to-date materials promoting the value of sports-based visitors and encouraging cities to treat field and management costs as investments. As part of this effort it may be necessary to summarize existing research or conduct primary research on the economic impacts of organized sports events. Advocate and facilitate the addition of sports venues to accommodate amateur athletics and actively work with sports venues and local event organizers to increase sports-related business in Snohomish County. Identify potential partners such as the tribes who have an interest in creating and promoting extreme sports on their lands.

Lead	Snohomish County Sports Commission
Timeline	2011
Resources	Staff resources, plus any potential funding from the Tourism Promotion Area

- iii. Enhance the sports facility guide and promotional materials.** Using the new branding for Snohomish County, update the sports facility guide and related materials to promote the organized sports market in the area.

Lead	Snohomish County Sports Commission
Timeline	2012
Resources	Staff resources, plus any potential funding from the Tourism Promotion Area

11. Promote adventure-focused day trip itineraries, packages and promotions.

Rationale. Visitors come to communities near Snohomish County, such as Seattle and Bellevue, and are often seeking unique Northwest experiences to augment their visits. While these surrounding communities have many assets of their own, the adventure assets in Snohomish County are unparalleled.

Approach. Promote that visitors to Seattle and Bellevue can maximize their visit to Washington by taking a side “adventure” trip up to Snohomish County.

Tasks.

- i. **Develop an advertising campaign focused on adventure day trips.** Buy advertising space in *Where* magazine and in local publications that serve surrounding communities such as Bellevue, Seattle and Tacoma, as well as Skagit County. Also include a buy in the hard copy *Where* publication that is in thousands of hotel rooms in the area. Skip advertising in publications (online or print) that do not directly reach visitors who are already in these communities when they are planning their add-on travel arrangements.

Lead	Snohomish County Tourism Bureau
Timeline	2011-2012
Resources	Staff resources, plus \$50,000 in expenses annually

12. Promote all itineraries, packages and promotions within target audience communities.

Rationale. Spreading the word through the external promotion of tourism offerings in Snohomish Counties is a good way to drive traffic to the Snohomish County Tourism Bureau website. Currently, the Snohomish County Tourism Bureau already implements a media relations effort and works with journalists. Targeting the distribution of itineraries, packages and promotions to those journalists will expand the marketing opportunities for attractions and assets.

Approach. Generate an ongoing media relations effort that takes advantage of new itineraries, packages and promotions. Always include the Snohomish County Tourism Bureau website information in the materials.

Tasks.

- i. **Conduct a press releases, pitch and media relations effort.** Modify the existing Snohomish County Tourism Bureau media relations effort to a monthly, rotating effort focused around the itineraries, promotions and packages available within the County.

Lead	Snohomish County Tourism Bureau
Timeline	2012
Resources	Staff resources

III. Rich Network of Sustaining Clusters and Sustaining Assets

13. Take a collaborative approach to strengthening the County's sustaining tourism clusters.

Rationale. In addition to the anchor clusters and attractions discussed above, Snohomish County is home to a rich array of smaller tourism assets. It is this network of experiences that encourage visitors to stay longer to explore related and nearby points of interest. Currently, the existing sustaining assets require more infrastructure development to enhance the tourism promotion efforts.

Approach. Bring together the sustaining tourism clusters to work collaboratively towards improvement. For the improvement of many of the clusters, it would be more efficient to let non-profits, interest groups, and local jurisdictions take the lead on the infrastructure development since these groups have the greatest insights, experience, and energy. Then, Snohomish County can work with the groups to promote the outcomes.

Tasks.

- i. **Convene a heritage and cultural tourism summit.** Bring together heritage and cultural tourism leaders to discuss their hidden assets and determine whether or not a full cultural audit for heritage and cultural assets should be conducted. Help plan and deliver workshops for cities and small towns to discuss the planning tools available through the National Trust for Historic Preservation and the National Trust's Main Street Program.

Lead Snohomish County Economic Development Division

Timeline 2013

Resources Additional County staffing resources, plus \$5,000 in expenses

- ii. **Work with arts, culture and heritage partners to develop and promote cluster activities.** Potential ideas include the following:

- Use established venues such as the Arts Council of Snohomish County to feature the work of local artists, including tribal artists.
- Develop the capacity to promote local artists that are not associated with a museum, gallery, or fixed space. Use existing organizations to promote opportunities for members to exhibit their work or provide suggestions on how to make their art available to tourists and Snohomish County residents. Feature local art, music, photography, and dance in available hotel space that is underutilized.
- Create weekly Art Studio tours with a special "All Artists Studio Tour" event once a year. Start with just a few hours on a Saturday and grow as possible, linking with culinary attractions along the tour route. Consider featuring a different artist or performing arts studio somewhere in the County as a place to visit each week.
- Create an inventory of local musicians from Snohomish, Island, King, and Skagit counties who can be featured in Snohomish County as part of a local brand to help incubate local musical talent.
- Map and categorize festivals and work with partners to develop cross-market collateral and websites to encourage festival attendees to consider festivals from other Snohomish County areas they have not visited.
- Strengthen the institutional potential of area museums as the primary opportunities to view county wide collections of artifacts.
- Promote community history more effectively through the County's website, with connections to the websites of History Link and the Washington State Department of Archeology and Historic Preservation.

Lead Snohomish County Economic Development Division with support from the
Snohomish County Tourism Bureau

Timeline 2013

Resources Additional County staffing resources

- iii. **Develop a historic sites partnership.** Work with the National Trust Main Street Travel and Historic Sites Program for Main Street communities in Snohomish County to help leverage funding for tourism, including the Preserve America funding mechanism.

Lead Snohomish County Economic Development Division Historic Preservation Officer

Timeline 2013

Resources Staff resources, plus \$30,000 in expenses

- iv. **Help grow and promote the emerging food and agriculture cluster.** Activities to grow and promote the cluster could include:

- Establish an anchor attraction in the food and agriculture cluster.
- Bolster and promote the emerging wine and distillery cluster; link culinary, farm, and wine/distilled spirit assets into an integrated food tour.
- Capitalize on the interest generated by culinary classes to link farms, salmon habitat protection, and farm communities with the table.
- Work with local micro-enterprise organizations or joint ventures to develop new restaurants that feature Snohomish County agricultural and seafood products.
- Develop culinary programs that specialize in seafood, river, and lake fish. Most existing culinary schools are located in south Snohomish County and none specialize in seafood or linking local fish with cooking.
- Support the development of value-added artisan shops, specialty stores, and classes. There appears to be an absence of value-added food stores outside of a few high-quality butchers, cheese shops, and farm stands.
- Create a “flavor of place” brand for Snohomish County farms and farm experiences to support and grow its market share; a strong regional example is “Whidbey Island Grown” that was funded by a combination of agencies and grants including the USDA.
- Develop a cross-market Community Supported Agriculture product line that brands Snohomish meats, fish, crops, and libations and baskets for local and regional use.
- Establish outdoor cooking schools and barbeque schools in the eastern part of the County, including food dehydration classes for backpackers and long distance kayakers.
- Help farms develop enhanced farm visits that include classes, demonstration hands-on garden plots, city chicken care, cheese making, animal care and on-farm inns and B&Bs.
- Include the expanded Western Heritage Museum at the Evergreen State Fairgrounds as a hub and exhibition center for agritourism in the County.
- Pair existing equestrian ranch stays with a focus on western cooking and outdoor fire cooking.
- Create wine, brewery, and distillery and food pairing classes.

Lead Snohomish County Economic Development Division Agriculture Coordinator in cooperation with sustaining asset stakeholders and with the support of the

Snohomish County Tourism Bureau

Timeline Dependent on stakeholder capacity; County should participate beginning in 2012

Resources Staff resources

v. Work with local tribes to strengthen the indigenous experiences cluster.

See strategy 23.

- vi. Collaborate with rural communities to enhance small town experiences.** Work with the towns to address gateway presence (plants, flowers, and removing litter) and provide training on biophilic design. Create a page on the Snohomish County Tourism Bureau website describing Snohomish County's small towns and providing links for all theme areas such as outdoor recreation, food, etc. Ensure each geographic cluster of towns has a compelling name, such as Sky Valley. Develop small town asset inventories that communities can do themselves to reenergize their efforts. Work with environmental organizations such as the Northwest Natural Resource Group, the Forest Stewardship Council, and others to showcase green harvesting practices in timber dependent communities.

Lead Snohomish County Economic Development Division

Timeline 2014

Resources Staff resources, plus inclusion in proposed website budget

14. Identify sustainable tourism opportunities

Rationale. A focus on sustainability is particularly important for attracting European tourists, some of whom make vacation decisions based on where they can "travel green." It's also of growing importance to Americans. For example, 61 percent of U.S. travelers believe their experience is better when their destination preserves its unique natural, historic and cultural sites, and 44 percent believe green practices are important. The Pacific Northwest is home to a collective rising tide of innovations in energy, green building, natural landscaping, green roofs and smart growth policies. Solar tours and sustainable business tours are increasingly being offered as part of a destination's sales strategy, both for tourism and as an economic development strategy. Examples include Sustainable Manufacturing American Regional Tours and the Portland Sustainable Business Walking Tour.

Approach. Highlight sustainable attractions and assets throughout all tourism promotion, and continue to assess the market potential of the Snohomish County sustainable tourism cluster.

Tasks.

- i. Create a dedicated sustainability page on the Snohomish County Tourism Bureau website.** Use an interdepartmental process to compile information and attractions related to sustainability, and use a consistent icon to highlight this theme in cluster- or attraction-specific collateral.

Lead Snohomish County Tourism Bureau

Timeline 2012

Resources Included in proposed website budget

- ii. Develop a sustainability asset inventory.** Generate a more comprehensive inventory of sustainable tourism options and consider tours associated with green building, energy, local food, ecotourism, and other relevant topics. Consider bringing together relevant County Departments, including Parks, Public Utilities, Solid Waste, and others to discuss the idea of sustainable tourism. Use this information and additional market data as available to continue to assess the strength of sustainability as a contributor to the County's tourism market.

Lead	Snohomish County Economic Development Division
Timeline	2015
Resources	Additional staffing resources, plus \$10,000 in expenses and inclusion in the proposed website budget

IV. Stronger County Tourism Infrastructure

15. Improve the tourism information delivery system.

Rationale. The current tourism information delivery infrastructure through the Snohomish County Tourism Bureau is cumbersome and generates too much printed material which eventually becomes waste. A new and innovate marketing infrastructure that is more nimble and easy to navigate will improve the County's image beyond the branding initiatives. The idea is to create maps, promotions and packages, as well as itineraries, which highlight the adventures in Snohomish County in easy-to-manage time periods. These examples of pre-defined trips can evoke the romance of adventure and exploration and can be tailored to thematic interests (water, food, the arts, aviation), or by time of year or geography. Maps, itineraries and package can help a visitor become inspired to visit more in the County and can help them maximize their adventures. They also make it easier for visitors to digest information whether online, at easy-to-access Visitor Information Centers and/or through volunteers.

Approach. Update the existing website with the new branding and improve site navigation. Also, consider improving Visitor Information Centers and minimizing volume of pre-printed collateral material by creating customizable packages of materials.

Tasks.

- i. **Improve the Tourism Bureau website.** Update the branding on the website and improve functionality. Also add in the new assets revealed during the planning process, develop a more intuitive navigation design, and incorporate sharper, higher resolution photographic images. Add in all itineraries, maps, promotions and packages, according to the templates designed, and blend in social media, GIS and any additional Smart Phone technology.

Lead	Snohomish County Tourism Bureau
Timeline	2012
Resources	Staff resources, plus \$150,000 in expenses

- ii. **Enable visitors to create custom itineraries based on interests, time, or geographic focus.** These could be developed on-line (with printable PDFs) and at computer kiosks in Visitor Information Centers. Build on regional effort being conducted in this area.

Lead	Snohomish County Tourism Bureau
Timeline	2012
Resources	Staff resources, plus inclusion in website budget

16. Update approach to putting information in visitors' hands

- i. **Evaluate options to improve Visitor Information Centers.** Review existing traffic flow and research new locations of Visitor Information Centers for greater impact. Also, place a full Snohomish County Tourism Bureau-sponsored Visitor Information Center within the Future of Flight Aviation Center. Consider movable Visitor Information Centers where volunteers or staff can use handheld technologies or touch

screen computers at heavily visited tourism destinations such as at Ranger Stations, transit stops, sporting events, and near the waterfront during high season. The movable Visitor Information Centers would also be an excellent source for collecting visitor data.

Lead Snohomish County Tourism Bureau
Timeline 2012
Resources Staff resources; plus \$45,000 in expenses

- ii. **Create a new, comprehensive Snohomish County Visitor Guide.** Generate a new guide, using the new branding, that highlights all the online materials and provides a guide to how to access the County. Use the guide as a way to minimize the amount of printed materials. Make sure guide covers all the clusters and the information for how to access materials online, including how to generate customized trip information.

Lead Snohomish County Tourism Bureau
Timeline 2013
Resources Staff resources, plus \$95,000 in expenses

- iii. **Ensure the County is using the most effective smart phone technology.** Examine the existing Smart Phone technology in use, and ensure that any technology is accessible on multiple platforms.

Lead Snohomish County Tourism Bureau
Timeline 2013-2015
Resources Staff resources, plus \$30,000 in expenses

17. Improve wayfinding and support the serendipity of discovery.

Rationale. To support the overall strategy of focusing on anchor clusters and anchor attractions, it is important that visitors can easily find their way, not only to these landmark attractions, but also to the rich web of sustaining attractions that encourage visitors to extend and broaden their experiences in Snohomish County. Currently there are many infrastructure gaps that may challenge visitors. These include: many existing business websites and brochures do not feature web addresses; answering machines or voicemails do not identify the business; and contact information can be very difficult to find. In addition, marketing brochures and other collateral of business and cities within Snohomish County need better directions or wayfinding coordinates.

Approach. Work with stakeholders in establishing a coordinated information and wayfinding system that makes it easier for visitors to find their way around Snohomish County.

Tasks.

- i. **Improve existing directions and contact information.** While much of the effort to better communicate contact information and directions on websites and printed materials needs to be done by individual organizations, the County can help prompt and guide this effort by encouraging a County-wide “cleanup” and communicating basic guidelines.

Lead Snohomish County Economic Development Division
Timeline 2011
Resources Additional County staffing resources

- ii. **Develop a coordinated and themed signage approach.** Work with city and the state Department of

Transportation to establish an integrated system that builds on the County brand and uses fun and attractive wayfinding icons to guide visitors to their destination and invite them to explore nearby attractions. Examples of icons include a sailboat or kite board for water-based activities, a pumpkin or chicken for farms, and a mountain for hiking or climbing. Distinctive township signs can also be developed that are emblematic of what makes the place special.

Lead Snohomish County Economic Development Division
Timeline 2013
Resources Additional County staffing resources, plus \$25,000 in expenses

- iii. **Seek to make the guidelines for signage on State highways more supportive of promoting local tourism attractions.** Work with other counties to approach Washington State Department of Transportation on this issue.

Lead Snohomish County Economic Development Division
Partners Other Washington counties
Timeline Ongoing
Resources Staff resources

- iv. **Support improvements in gateway community presence.** Work with stakeholders to create well-designed gateways to Sky Valley and towns at either end of the Mountain Loop Highway, including Lake Stevens, Granite Falls and Darrington. Use attractive signage, plants, and flowers to reflect and leverage the natural context of these small towns. Work with microenterprise organizations regionally to help develop fishing, hiking, hunting, and wildlife viewing equipment suppliers.

Lead Snohomish County Economic Development Division
Timeline 2015
Resources Additional County staffing resources, plus a grant program for gateway communities to support these improvements. Designate \$200,000 for this grant program.

18. Improve public transportation options to enhance access to tourism assets.

Rationale. Transportation challenges and the need for investment in transportation infrastructure was by far the greatest and most commonly cited need raised by stakeholders in the Plan development process. Many of Snohomish County's tourism assets are not easily or immediately accessed by public transit. While it may not be feasible to create a tourism-serving public transportation network, it is important to understand the value of ease of access to both anchor and sustaining clusters.

Approach. Utilize the interest of a few existing industry sectors to improve transportation options between destinations, and then consider wider-scale transportation opportunities.

Tasks.

- i. **Facilitate countywide efforts to address infrastructure gaps, with particular focus on transportation**

Lead Snohomish County Economic Development Division
Partners Tourism and economic development stakeholders, cities, tribes, transportation policy makers and planners
Timeline 2011
Resources Additional County staffing resources

19. Support the broadening of the County's range of overnight options.

Rationale. The County's existing lodging facilities are generally in relatively high demand, with lower vacancy rates than surrounding markets. Attractive lodging options for a diverse range of visitors are a critical component in efforts to encourage visitors to stay longer in Snohomish County. Overnight visitors stay longer, spend more, and support a wider range of tourism attractions and services than day travelers.

Approach. The strategies below focus on strengthening existing hotels and on broadening the type of lodging options available to Snohomish County visitors.

Tasks.

- i. **Facilitate dialogue on strengthening existing overnight accommodations.** Support a hotel differentiation strategy by helping local hotel owners and managers build on their branded template to engage in distinctive programs and actions that make them different from their counterparts.

Lead	Snohomish County Lodging Association
Partners	Hotel and motel owners; non-traditional lodging
Timeline	2012
Resources	Funds made available through Snohomish County Lodging Association

- ii. **Continue to recruit higher-end hotels.**

Lead	Snohomish County Economic Development Division
Partners	Snohomish County Lodging Association; local communities
Timeline	Ongoing
Resources	Additional County staffing resources

V. Enhanced Organizational Capacity

20. Strengthen the County's ability to coordinate tourism efforts and implement this Plan.

Rationale. The existing staff resources do not cover the amount of work needed to coordinate the business of tourism in Snohomish County. The dedication of focused personnel on coordinating efforts and acting as a liaison between departments or jurisdictions will ensure that the tourism work is effectively carried out. In addition to the County, the Snohomish County Tourism Bureau will be a primary implementer of this Plan and so it is critical that the organization's full resources be focused on and aligned with this strategy.

Approach. Add an additional team member to manage the tourism efforts and focus resources of the Snohomish County Tourism Bureau on the implementation of this strategy.

Tasks.

- i. **Create a full-time tourism position within Snohomish County.** This person would administer the Tourism Strategy and all funded organizations and projects; act as a liaison among County, PFDs, cities, non-profits, and local businesses; administer local and county-wide lodging tax programs and the proposed Tourism Promotion Area; and coordinate with Workforce and Worksource development to provide job training and employees.

Lead	Snohomish County Economic Development Division
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Timeline 2011
Resources \$100,000

- ii. **Align the Snohomish County Tourism Board's efforts with this Plan.** Evaluate the Snohomish County Tourism Bureau's current capacity and workplan, while adopting a new workplan that focuses efforts and accountability on implementing this Plan.

Lead Snohomish County Economic Development Division
Timeline 2011
Resources Additional County staffing resources, plus \$10,000 in expenses

21. Use data to strengthen tourism promotion and development efforts

Rationale. Building a strong information base related to Snohomish County visitors will ensure that promotions are on-target, which will in turn increase the number of visitors coming to and staying in the County.

Approach. Categorize all research in an easy-to-access format and create a systematic approach to further data input. Encourage information sharing and cross-referrals, building on the idea that all stakeholders will benefit from a collaborative approach to increasing the strength of the County's network of assets. Ask all stakeholders to share their data within the tourism community to improve data repository.

Tasks.

- i. **Coordinate data collection.** Create and share templates for partner organizations to use in collecting data, making it easier for them to do so, and ensuring that they are asking for consistent information. Assist in compiling, analyzing, and sharing data, including data from ambassadors, Visitor Information Centers, friends and family teams, and partner organizations.

Lead Snohomish County Tourism Bureau
Partners Data collection partners
Timeline Ongoing
Resources Staff resources

- ii. **Create an easy-to-maintain repository of information.** This online location for information would include current contact information, staffing, program updates, and data. Develop a protocol to ensure updates are provided to this central repository. A SharePoint site or other technology tool can be utilized to house the information and permissions can be granted between Snohomish County and the Snohomish County Tourism Bureau.

Lead Snohomish County Tourism Bureau
Timeline 2011
Resources Staff resources

- iii. **Develop a "friends and family" team to collect visitor data.** Recruit local volunteers willing to collect information from visitors in exchange for a discount at a local County attraction. Develop a survey and survey collection method, as well as an approach to analysis.

Lead Snohomish County Tourism Bureau
Timeline 2011

Resources Staff resources; \$15,000 in expenses

- iv. Maintain up-to-date market research insights.** Build on market research done during branding to maintain a rich understanding of visitors to Snohomish County, sharing this information with all stakeholders. Use intercept surveys and focus groups, as well as targeted market research. Consider using intercept surveys on the Washington State Ferry System, at hotels, and at other sites that may not normally be considered.

Lead Snohomish County Tourism Bureau

Timeline 2012

Resources Staff resources, plus \$75,000 in expenses

22. Broaden and enrich the conversation between the County and stakeholders.

Rationale. Successful relationships require ongoing conversation. During the planning process, it became apparent that the communications within the County's tourism community is predominantly one-way. The County and the Snohomish County Tourism Bureau – despite best intentions – primarily share information to their stakeholders with limited opportunity for feedback. By creating a two-way dialogue within the tourism community, Snohomish County tourism will be bolstered and the ability for dynamic growth and promotion will improve.

Approach. Take a cross-disciplinary approach to tourism planning and encourage two-way dialogue by developing forums and survey instruments for collecting feedback, as well as convening regular roundtables. Determine ways to bring new stakeholders into the conversation to expand the tourism community. The type, number, and range of stakeholders contributing to tourism planning are now somewhat narrow in range, which in turn narrows the inventory and perspective on tourism potential overall.

Tasks.

- i. Hold regular stakeholder roundtables and encourage new stakeholders to join the dialogue.**

Lead Snohomish County Economic Development Division

Timeline Ongoing

Resources Additional County staffing resources

- ii. Develop a work plan to involve more stakeholders in tourism planning and development.** Identify non-tourism organizations and persons to include in tourism planning and development, drawing on the County's non-profits and community groups, state and local agencies, and interested individuals. This will ensure that a more varied perspective and set of skills are deployed in the tourism development process and lead to more diverse, creative outcomes and engage more organizations in the process during a time of unprecedented budget crisis.

Lead Snohomish County Economic Development Division

Timeline 2011

Resources Additional County staffing resources

- iii. Share and respond to stakeholder feedback.** Develop a twice a year report that shares feedback gathered and Snohomish County responses to the data, along with actions.

Lead Snohomish County Economic Development Division

Timeline	2011
Resources	Additional County staffing resources

23. Build stronger partnerships with the tribes to enhance and encourage indigenous tourism experiences.

Rationale. The Sauk Suiattle, Stillaguamish, and Tulalip Tribes are critical partners, not only with regard to tourism, but also to natural resource management and a host of other issues. With regard to tourism, the County, the tribes, and other stakeholders will benefit from an integrated and coordinated strategy that promotes and knits together tribal and non-tribal assets and services.

Approach. The County's relationships with the tribes can be improved through more regular meetings and dialogue. As this partnership grows, additional opportunities for collaboration can be identified and pursued.

Tasks.

- i. **Support better, two-way dialogue and collaboration.** Ensure tribes are included in relevant discussions as appropriate given their status and interests. Establish a quarterly roundtable with tribal tourism representatives. Include tribal leaders as regular members of general stakeholder discussions in addition to the quarterly roundtable.

Lead	Snohomish County Economic Development Division
Partners	Tribes
Timeline	2011
Resources	Additional County staffing resources

- ii. **Promote tribal art and tourism related to indigenous experiences.** Work closely with the tribes to develop indigenous experiences that celebrate the cultural assets of the tribes. As part of this effort encourage a salmon-centric strategy between tribes, environmental groups, parks departments, and other stakeholder groups to elevate the potential for sustainable tourism through salmon resources. Collaborate with the tribes on developing interactive Native American tourism experiences.

Lead	Snohomish County Economic Development Division
Partners	Tribes
Timeline	2013
Resources	Additional County staffing resources

24. Support professional development for the County's tourism workforce.

Rationale. Much of the work in promoting the County's tourism market will continue to be accomplished in a distributed, decentralized way at the level of individual assets and facilities. And, of course, actual interaction with visitors will occur at individual tourism assets and events. The County can help provide trainings and other professional development opportunities to ensure that these decentralized activities and interactions are done to a high standard of professionalism and customer service.

Approach. Implement strategies that coordinate with the Snohomish County Workforce Development's *Blueprint 2020* and provide topical trainings for the County's tourism workforce.

Tasks.

- i. **Coordinate with the Snohomish County Workforce Development's *Blueprint 2020*.**

Lead	Snohomish County Economic Development Division
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Timeline Ongoing

Resources Staff resources

- ii. **Provide targeted professional development opportunities.** Develop an annual schedule of options for training, information sharing, and capacity-building through peer-to-peer mentoring and Tourism Bureau-sponsored or -provided trainings. These events should be coordinated with the implementation of other strategies in this Plan, ensuring that training is relevant to and supportive of current efforts. Consider the following areas and build in ongoing monitoring of professional development needs and results: incorporating heritage and history into sub-regional and place-based storytelling about people, land, and buildings; use of technology, including mobile technologies and interactive websites; use of social media; and the development of marketing materials, including workshops in copy editing, photography use and the appropriate, professional, and measured use of video (YouTube in particular). The Bureau should also provide “It’s Local” training for employees and service workers who may interact with visitors and training in dealing with difficult customer relations and how to resolve conflict and provide excellent customer service that is meaningful and authentic.

Lead Snohomish County Tourism Bureau

Timeline Ongoing

Resources Staff resources, plus \$10,000 annually for expenses

- iii. **Contact new tourism related businesses.** Engage them and educate them about County and State tourism activities and programs.

Lead Snohomish County Tourism Bureau

Timeline 2011 and then ongoing

Resources Staff resources

VI. Tourism Funding Resources Align with Strategic Goals

25. Leverage the lodging tax effectively to advance the tourism strategy.

Rationale. Lodging tax resources are an important tool to strengthen and promote the County’s tourism assets. To achieve maximum benefit and provide the greatest return on investment, the use of lodging tax resources should be directly targeted at implementing the strategies contained in this Plan.

Approach. Require specific changes to how the Small and Large Funds are administered and awarded.

Tasks.

- i. **Modify the requirements and evaluation criteria used to make Small Fund awards.** Adopt the following changes:
- Require that all applications illustrate how projects advance a current or ongoing initiative within this Plan.
 - Increase the points given for cross-promotion, or require that a percentage of all awards focus on cross-promotion. This requirement would leverage lodging tax dollars to promote multiple tourism attractions, events, or supporting services such as hotels or restaurants.

Appendix D
summarizes revenue sources available to support the Snohomish County tourism industry.

- Prioritize new applicants without ruling out repeat applicants.
- Award points for proposals that include clear mechanisms for measuring the impact of the investment.
- Allow marketing dollars to be spent within Snohomish County.

Lead Snohomish County Lodging Tax Advisory Committee

Timeline 2011

Resources Staff resources

- ii. **Promote funding accessibility.** Promote funding opportunities to ensure broad participation and clarify and formalize small fund evaluation criteria according to the small fund requirement changes.

Lead Snohomish County Lodging Tax Advisory Committee

Timeline Ongoing

Resources Staff resources

- iii. **Formalize the process and criteria for making awards from the Large Fund.** The Large Fund dollars should be allocated to support the implementation of timely items from this Plan. The process by which these allocations are made should be clear and transparent to all stakeholders.

Lead Snohomish County Lodging Tax Advisory Committee

Timeline 2011

Resources Staff resources

26. Support the emerging Tourism Promotion Area.

Rationale. The proposed Tourism Promotion Area represents an important additional funding mechanism to strengthen the County's tourism opportunities. The Tourism Promotion Area will focus resources on supporting business that will generate overnight visitor stays thus impacting the economic impact of tourism to the greatest extent.

Approach. The County should do all it can to facilitate the adoption and successful implementation of this new funding tool, ensuring the Tourism Promotion Area resources are aligned with other efforts to implement this Plan.

Tasks.

- i. **Facilitate the adoption of the Tourism Promotion Area.**

Lead Snohomish County Economic Development Department

Partners Hotel industry and tourism stakeholders

Timeline 2011

Resources Staff resources

Appendix A: Initial Findings

OVERVIEW

The Frause Team conducted extensive research in advance of defining any observations and determined its initial findings before making internal and external recommendations. This memo outlines the research conducted and includes a review of major findings under consideration for the full Snohomish County Tourism Plan. The Plan will include more analysis of the research as well as does the Workshop/Focus Group and Other Feedback document.

Comprehensive Research

One-on-One Meetings

Frause Team members met one-on-one, whether in person or on the phone, with the following list of people:

- Donna Ambrose, Snohomish County Economic Development Division
- Koran Andrews, Jamilie Smith, Emmalee Hop and Casey Stevens, Stillaguamish Tribe
- Wendy Becker, Snohomish County Economic Development Division
- Shari Brewer, Off the Beaten Path and Darrington Citizen
- Stephen Clifton, City of Edmonds Office of Economic Development
- Debbie Copple, Sky Valley Chamber of Commerce
- Catherine D'Ambrosia, Port of Everett
- Sherrill Dryden, Everett Performing Arts Center
- Dave Gossett, Snohomish County Council Member
- Patti Gobin, Special Projects Director for the Tulalip Tribe
- Scott Grindley, Marina Director for the Port of Everett
- Gary Haakenson, Snohomish County Deputy Executive
- Nick Harper, Cascade Land Conservancy
- Adrian Hunt, Executive Director of the Flying Heritage Collection
- Nancy Johnson, Executive Director, Imagine Children's Museum
- Marla Kempf, Port of Edmonds
- Jason Knight, Alderleaf Wilderness College
- John Koster, Snohomish County Council Member
- Darla Lau and Kerri Longergan, Washington Restaurant Association
- Jan Mabee, Nancy DeCoteau & Laurence, Sauk Suiattle Tribe
- Joe McIlwain and Beth Braun, Edmonds Center for the Arts
- John Mohr, Director, Port of Everett

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Appendix A: Initial Findings

- Mary Monroe, City of Lynwood, Office of Economic Development
- Kelvin Moore, Lynnwood Convention Center
- Linda Neunzig, Snohomish Agricultural Project Coordinator
- Maren Oates and Elizabeth Smith, Arts Council of Snohomish County
- City of Darrington
- City of Index
- Matt Perkins, Washington Climbers Coalition
- Aaron Reardon, Snohomish County Executive
- David Reese, Boeing Everett Visitor Relations
- Matt Smith, Snohomish County Economic Development Council
- Barry Smith and Sandy Ward, Future of Flight Foundation
- Brian Sullivan, Snohomish County Council Member
- Amy Spain, Director, Snohomish County Tourism Bureau
- Rick Steves, Rick Steves Travel Center
- Dave Somers, Snohomish County Council Member
- Tom Tiegen, Director Snohomish County Parks

Workshops/Focus Groups

Each industry cluster area below was able to participate in an open meeting at the Snohomish County building for a dialogue about tourism. In addition to these clusters, the Frause Team promoted and staffed an “Open Meeting” where anyone from the public could stop in and share their insight.

- Arts/Culture/Heritage
- Aviation
- Farms/Food
- Lodging
- Outdoor/Parks
- Public Agencies
- Snohomish County Tourism Bureau

Discovering Assets

In addition to the one-on-one interviews and focus groups, the Frause Team conducted a snowball sampling process to find unique tourism assets for consideration in Snohomish County. The snowball sampling process took into consideration analysis of materials and meetings, as well as phone calls from individuals within the tourism community. The results are being added to a full roster of assets in the Asset Inventory document. The snowball sampling process review included these specific types of sources.

- Local newspapers and blog
- Meet-Up groups
- References for small town America and community quirks
- Word of mouth and personal referrals

Online Survey

A more than 20 question online anonymous survey was distributed to a comprehensive database of stakeholders, and promoted through a variety of channels, including email, the Snohomish County Tourism Bureau newsletter and a postcard. Access to the survey was offered to anyone that was interested in giving their opinion and either was not able to attend a workshop or wanted to share their input confidentially.

Brand / Promotion Review

Extensive attention was paid to reviewing the brand and promotional elements within the Snohomish County Tourism community. The Frause team examined many materials and online resources, such as:

- Snohomish County Tourism Bureau website
- "Snohomish County Treasures of the Pacific Northwest" book
- Existing signage assets
- Social Media
- Visitor Information Centers
- Tourism company websites

Data Review

Seeking quantitative and educational data on the state of tourism in Snohomish County was a strong component of the Frause Team process. Before considering findings, the team reviewed these materials and conducted an analysis of the information.

- 2009 Person Expenditures
- Dean Runyan studies on tourism
- Lodging Tax Funds
- Small and Large Fund Recipients
- 2000 Strategic Plan for Tourism Development and Marketing (and Outcomes)
- Prosperity Partnership Regional Economic Strategy, Tourism and Visitor Cluster Strategy Report
- Project Concentrus Online Information
- Snohomish County Blueprint 2015
- Washington State Department of Commerce website
- Bureau organizational structure
- Smith Travel Research lodging data
- Port of Everett Marina Survey
- 2010 Council Budget Note on the Future of Flight
- Future of Flight Strategic Plan 2010-14

Topics Considered in Research

Throughout the process of gathering data and reviewing information, the Frause team took the following inquisitive approach to problem solving and focused attention around core areas such as:

- Desired project objectives
- Review of potential challenges
- Funding context (taxes, grants, other)
- Asset inventory known to-date
- Current tourism market analysis including current assets, hidden assets and potential gaps
- County's current tourism brand and promotional
- Ideas considered for promotion
- Regional or national models of interest
- Stakeholders impacted by plan
- Atypical stakeholders not included that should be in the future
- Methods of coordination, collaboration and communication
- Partnerships

SPECIFIC FINDINGS

In order to provide recommendations, it is imperative that the data review and analysis extends into an assessment of findings. The final Snohomish County Tourism Plan recommendations will be based on a consideration of these findings. In the course of further exploration, additional findings may arise. These findings are provided in an overview format and will be expanded on in the final report.

Brand / Marketing

- The tourism community appreciates the work of the Snohomish County Tourism Bureau.
- The Snohomish County Tourism Bureau creates an inclusive process for marketing.
- The current brand is disparate, overwhelming and does not provide specific focus.
- Brand identity is outdated and does not reflect the full County offerings.
- Website is difficult to navigate and limited in suggested itineraries and tourism providers.
- Minimal packages or cross marketing exist.
- Signage and wayfinding prompts are limited within the County.
- Storytelling does not cover the wide scope of offerings within the County and marketing is not personal or enlivened.
- Marketing collateral is overwhelming and hard to navigate (like the website).
- A new brand and tagline is essential. "Close to everything. Far from ordinary" does not adequately define the attributes of the county. "Close to everything" may not reinforce overnight stays. "Far from ordinary" doesn't say enough about what's there.

Data

- Further study is warranted regarding how other tourism districts have defined themselves with quantifiable results.
- Limited data makes it difficult to make decisions based on a return-on-investment.
- Only a few organizations within the County have visitor data, and even that is not comprehensive.
- Data is not shared broadly enough with a focus on two-way dialogue.
- Need intercept surveys and focus groups as well as targeted market research.

Attractions/Assets

- The County has a wide variety of attractions and assets – urban to rural, active recreation to cultural enrichment, business- and shopping and leisure travel.
- An abundance of attractions begs the question of how to develop focus.
- Anchor attractions directly impact brand and hotel/motel stays (and lodging taxes).
- Anchor attractions, and even supplementary attractions, need infrastructure support.
- The visitor does not easily find a guide (or itineraries) that make it easy to visit.
- Transportation does not adequately connect assets.
- Many of the individual attractions can be experienced in a day (or even a few in a day).
- It is difficult to find attractions easily.
- Volume of attractions and locations calls for a geographically-based packaging system.
- Sustainability is not a priority within the tourism community outside of the farms/food.

Lodging

- There is little to no focus on alternative lodging like vacation rental by owners, B&Bs and cabins.
- The existing lodging inventory is well-used.
- Zoning restrictions limits development of additional lodging options on farms.
- No high-end hotel or alternative hotels such as boutique or yurts.
- Confusion around Expedia and other online booking websites with respect to revenue.
- The perception is that there is minimal support in bringing in the conventions that generate room nights; Lynnwood Convention Center is challenged to attract multiple day events (and resulting overnight stays) without a connected hotel.

Communication / Relationships

- Snohomish County Tourism Bureau works hard at creating an inclusive feeling.
- There is minimal communication between stakeholders, and some stakeholders feel that they are only called up on for money or promotions versus idea-sharing.
- A lack of stakeholder contact information or out-of-date information is an impediment for collaboration.
- The communication, whether from the County or the Snohomish County Tourism Bureau, is one-sided and not very frequent.
- The focus about tourism dollars in Snohomish County is around funding.
- Lack of multi-jurisdiction coordination between County, cities, attractions and other stakeholders.
- Tribes require more proactive attention beyond funding requests.

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Appendix A: Initial Findings

- In some situations stakeholder groups need expanding to engage subject matter experts from neighboring counties where there is crossover of site adjacencies.

Funding

- Existing small fund recipients need to be reviewed for relevancy and an understanding of return-on-investment related to tourism attraction; it cannot be good enough to give money to organizations each year unless they can demonstrate a set contribution to the growth of tourism as defined by the County.

Workforce

- Seasonal workforce limits message delivery options and familiarity with County assets.
- Hotel representatives seem open to training seasonal workforce.

Appendix B: Workshop/Focus Group and Other Feedback

OVERVIEW

The Frause Team facilitated seven workshops/focus groups for the discovery portion of Phase II of the Snohomish County Tourism Plan development process. Working with Donna Ambrose and Wendy Becker from the Snohomish County Economic Development Department, the following clusters participated in the workshops/focus groups:

- Arts/Culture/Heritage
- Aviation
- Farms/Food
- Lodging
- Outdoor/Parks
- Public Agencies
- Tourism Bureau Board

However, because of the number and range of interests, as well as the ideas that fell outside the workshop parameters, additional information collection opportunities were established. These included one-on-one interviews, an anonymous online survey and an “Open Door” workshop where anyone could come in and provide their input. All of the workshops and feedback opportunities occurred during the summer/fall of 2010. This document provides highlights from the focus groups as well as other feedback mechanisms.

FEEDBACK REVIEW

Discussion / Survey Questions

A common set of questions helped guide the discussions for each workshop. The questions were guides to facilitate and generate conversation. Some groups had greater interest in certain questions over others, but all were able to speak to all the points. The interview outcomes are organized around the questions below. The online survey questions were developed from these questions.

- What type of business are you?
- What feedback have you actually had from guests, or customers, about their *experiences* in Snohomish County?
- What experience would attract you to Snohomish County if you were an interested tourist or visitor?

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Appendix B: Workshop/Focus Group and Other Feedback

- What tourism experiences (events, places, services) do you think Snohomish County is best known for?
- What are the hidden tourism assets (Little known events, places, opportunities) within the County?
- What is the number one gap in tourism offerings within Snohomish County, such a service that isn't available or a need that isn't being met?
- Why do you think that tourism offering not available within Snohomish County? What is the impediment?
- Do you track data on visitor demographics and origin? If so, what do you use (check all that apply, such as online surveys, focus groups, outside research).
- What barriers do you think keep visitors from coming to Snohomish County, whether for business travel or tourism?
- WITHIN the state of Washington, but excluding Snohomish County, what cities or destinations tourism marketing efforts capture your attention?
- What other cities or destinations in the United States but OUTSIDE WA capture your attention with their marketing efforts around tourism?
- What is ONE effective thing that Snohomish County already does to promote county tourism and help your organization or business thrive?
- What would be the ONE most important thing that Snohomish County could do to promote county tourism and help your organization or business?
- How do guests/customers locate your business? (Tourism Bureau Website, Snohomish County Visitor Information Centers, Corporate web page, Travel web sites like Expedia or TripAdvisor, Facebook, etc.)
- Where do you advertise for your business?
- What is your willingness to contribute to a collaborative marketing initiative that does not specifically promote your business or organization, but raises awareness for Snohomish County as a destination in general?

Workshop Results

Arts Culture/Heritage

Attendees:

- *Warner Blake, Snohomish County Historical Society*
- *Mary Jane Anderson and Amy Spain, Snohomish County Tourism Bureau*
- *Joseph McIlwain, Edmonds Public Facilities District and Edmonds Center For the Arts*
- *Margaret Riddle, History Link and Snohomish County Heritage League*
- *Bob Rinehart, Edmonds Center for the Arts and Edmonds Chamber of Commerce*
- *Paula Schwartz, City of Mountlake Terrace*
- *Valerie Steel, Historic Everett*
- *Francis White Chapin, City of Edmonds*
- *Bruce Wirth, KSER Foundation*

There are plenty of hidden assets within the arts/culture/heritage clusters. The group was able to generate one of the longest lists of hidden assets than any other group, a tell tale sign that they are a large group and a disparate group that could be hard to package without a concrete and focused strategy. At the same time, the arts/culture/heritage focus group participants exhibited great pride and enthusiasm around their offerings and their potential to bring people to the area.

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Appendix B: Workshop/Focus Group and Other Feedback

This group felt there was not enough emphasis on cultural tourism, particularly in the area of packaged tours. They believe there is a direct link between agritourism and heritage sites in the county, particularly east of I-5. This group recommended working more closely with Tribal communities to elevate the understanding of the County's cultural history.

They voiced great enthusiasm for the County's natural resources and wanted to see more emphasis on these assets as well. Unanimous recommendations were made to use these resources as a defining mechanism for tourism resources.

At a municipal level, the City of Edmonds clearly listed off the greatest concentration of assets and their representative provided perspective, on what they felt, was the most complete tourism experience in terms of shoreline access, visual and performance arts, shopping, walkability and dining. The representative from Mountlake Terrace felt disadvantaged based on how the City has evolved and its lack of assets. Everett offered information on a good variety in sports opportunities (including fishing), visual arts, music events and the farmers market in the marina district access as well as great historic architecture experiences. They encouraged more shoreline access be made possible by the Port of Everett.

All participants acknowledged that their success was contingent on support from the County and were grateful for grant monies awarded to them. Bruce Wirth from KSER encouraged more engagement amongst this group with the public radio station to increase awareness of County assets and to help maximize the investment received by the station. Bruce would like to see more collaborating with KSER.

There was unanimous support for marketing new residents in the county and tapping into local community support more effectively, especially in regards to advertising campaigns.

Aviation

Attendees:

- *Denise Anderson, Historic Flight*
- *John Sessions, Historic Flight*
- *Barry Smith, Future of Flight*
- *Dave Waggoner, Paine Field*

The aviation focus group felt that the Boeing Tour is the core attraction of the aviation sector in Snohomish County. However, there are many other new and interesting new businesses, such as Future of Flight, Flying Heritage Collection, Historic Flight Restoration Center, Museum of Flight Restoration Center and Legend Flyers, which offer aviation history and interactive exhibits.

Boeing is a top Pacific Northwest anchor attraction because of its brand name, but there are other unique and interesting aviation adventure opportunities from the corollary aviation attractions, such as fly-along opportunities, weekend air shows, seminars, photo opportunities, and education.

The biggest challenge that the aviation sector faces is awareness about its offerings, minimal hotel rooms for packaged promotions and available transportation away from Paine Field as well as to other attractions for bus tours. The industry is now collaborating on packages and a passport that will encourage guests to try each aviation attraction within Paine Field, and it is working with the Snohomish County Tourism Bureau to create an

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overarching brand and generate marketing materials that promote the attractions together. Each individual aviation attraction is also invested corporate marketing, which makes them a compelling collaborative marketing partner for Snohomish County.

The aviation sector businesses believe they offer accessible adventures as well as culture and history. They also believe that Snohomish County is known for the Boeing Tour, although it is often viewed as a Seattle attraction and doesn't have the concentration of assets typically associated with a larger city. The group felt that the area has a distinctive charm and history that could be packaged – such as the industrial history of Everett – with the aviation sector for great results.

The lack of a high-end hotel fit for Boeing executives and Boeing guests is an issue. The Future of Flight is looking to become the hub of new airline launches, but needs a better facility for the “ribbon-cutting events” although the funding issue continues to be a barrier. The group believes commercial air service, as an economic development strategy, would address the high-end hotel deficit.

Throughout the conversation, it was clear they have great pride in their history and trade. Yet, they also feel that there are opportunities to partner with other parts of the county and other industries to attract more people to the area. With wayfinding signage, a focus on international travel, and a greater emphasis on marketing aviation as an anchor industry in Snohomish County, the collective group felt they could bring in many visitors to the area.

The sophistication of the aviation marketing, online promotion and collaboration was a highlight of the focus group, especially in regards to data collection (a factor that is missing from other Snohomish County tourism industries).

Farms/Food

Attendees:

- *Biringer Farms*
- *Bob's Corn*
- *Craven Farm*
- *Fosters Corn Maze*
- *Linda Neunzig*

The guests that experience the agricultural resources in the farms/food clusters find Snohomish County as beautiful, peaceful and quiet destination. They love the open space feeling and find themselves very connected to the food and farms. Farm tours are a good place for families and are places where people that grew up in Snohomish County can bring their own children. One of the unique factors of the Snohomish County farm and agricultural community is that it is close to the city, yet still tucked away in a rural setting.

There are many best-known assets, such as Red Rooster Route, Biringer Farms, Stockings Farm, Evergreen State Fair, and fun festivals including the Pumpkin Festival, Red Rooster Fall Festival, Sky Valley Farm Festival and the Festival of the River. At the same time, there are many hidden assets within the community – and not just agricultural assets - from smaller fairs in Stanwood to Lord Hill Park, Silvana Meats, Flowing Lake Cabins and the Willis Tucker Water Park. (The complete list of assets has been added to the Master Inventory Report developed by the Frause team.) Boeing was on the list of best-known assets, even though it fell out of the farm/food cluster.

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Much like the aviation sector, a significant gap in the County's tourism offerings are hotels or other forms of accommodation. Other identified gaps included a big water park, a permanent regional farmer's market, farm animal viewing and more hands on tribal cultural opportunities. Solutions for how to solve these were not readily available.

There are a number of barriers to visiting Snohomish County that were identified in this focus group: lack of targeted direct marketing, zoning and permitting issues for on-farm activities and accommodations, traffic, lack of organized bus tours, inability or awareness around Pan-Asian travelers, incorrect directions from online maps, and limited signage. An interesting factor that came up was a generational problem where younger people don't seem as interested in farming.

Lodging Association

Attendees:

- *Tracy Banfield and Donna Cappa, Tulalip Resort*
- *Doug Bartells and Kelly Moore, Holiday Inn*
- *Charlette Bishop, Hampton Inn & Suites*
- *Georgia Borg-Leon, Residence Inn Lynnwood*
- *Linnie Boyers and Mark Lee, Silver Cloud Mukilteo*
- *LeeAnne Browner, Hilton Garden inn Bothell*
- *Tanya Christenson, Hilton*
- *Edward D. Hansen Comcast Arena*
- *Keith Lander, Best Western Cascadia Inn*
- *Mary Monroe, City of Lynnwood*
- *Angie Mykel, Lynnwood Convention Center*
- *Michele Osgood, Seattle Premium Outlets*
- *Jan Simon Aridj, Washington Lodging Association*
- *Amy Spain, Mary Jane Anderson and Tammy Dunn, Snohomish Tourism Bureau*

The theme of landscape grandeur and the beauty of the County were strong outcomes of this focus group. There is a diversity of offerings in Snohomish County and, with low parking charges and reduced taxes, there is plenty to offer a guest. This group finds the County's assets not easily accessible and the lack of walkability is an impediment. Some of the best assets include the suite of aviation offerings and Boeing, the Tulalip Casino, shopping, Downtown Edmonds, the closest Nordstrom to the Canadian border, the Evergreen State Fair and kitesurfing.

Some hidden assets include Jetty Island, Big Four Ice Caves along the Mountain Loop Highway, Arlington Kangaroo Farm, Wine Tasting, Maltby Café, Amici Bistro in Mukilteo, Chopsticks Restaurants, scuba diving, Lake Stevens as a triathlon destination and the Snohomish River Estuary.

The focus group participants in this category felt there were a dearth of kayak businesses and, a meager inventory of all types of water, sports and recreation businesses. It would be great if the County could attract tours from the cruise ships that come into Elliott Bay, as well as a theme park and more trails to promote.

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Appendix B: Workshop/Focus Group and Other Feedback

Commercial aviation popped up again as reason why more people don't come to Snohomish County as visitors become almost anchored in an aviation attraction and do not, or are unable to, visit other places given the County's spread out geography.

Other barriers included inadequate advertising, funding, weather, a small convention center, limited walkable destinations around the convention center, an abundance of assets that cannot be fully advertised and a general lack of identity. A big issue, they believed, is that Seattle and British Columbia steal the show on both sides.

Promoting the area as a film destination might be a good way to overcome some of the challenges, as would be developing a personality that actually works for the County and is not too broad. That personality would need to be promoted in a tagline and brand, and added to everything to help unify the 19 cities within the County. A more effective lodging tax allocation is needed, as well as a better way to work around booking agents like Expedia that don't generate revenue. Entertainment, business recruitment, cultural assets, trendy restaurants, a good hotel and a mixed-use residential/commercial development would all be strong benefits to add to the tourism package.

Outdoors/Parks

Attendees:

- *Tammy Dunn, Snohomish County Tourism*
- *Paula Schwartz, Planner, City of Mountlake Terrace*
- *Steven Slawson, City of Sultan*
- *Lou Stevenson, Director of Athletics, City of Everett*
- *Tom Tiegen, Snohomish County Parks*

Note: The group of people that attended the focus group were all from government agencies. There were no non-profit professionals or outdoor recreation professionals who attended, however, one-on-one interviews were conducted with non-government people outside of the focus group to garner more input as part of the snowball sampling strategy. The feedback from the one-on-one conversations is included in the overarching data recommendations.

These focus group participants felt that their guests had an amazing love for Snohomish County and that they liked the cooler weather (with less humidity). Well-maintained parks and facilities were a plus, as well as the flyfishing in Sultan and the Monroe Swift Migration. They felt that the rivers and beaches were strong attractions as were the guided trips in parks and birdwatching, and the ability for people to leave the city for a cabin without much effort.

The best known assets were the migratory Swans, the Wildlife Refuge on the South Side of Lord Hill, Boeing, the outdoors in general, Evergreen State Fair, shopping and the Tulalip Casino. Unique hidden assets included the recording studio in Index where Fleetwood Mac recorded, the shooting range on the Everett-Bothell Highway, Bigfoot seekers, panning for gold, music in the parks, Harris-Indian Longhouse, Sky River Meadery and the Darrington Archery event, among others (again, all hidden assets are identified in the Master Asset Inventory Report).

The big gaps in tourism offerings are an indoor soccer field, facilities to support major sports tournaments and good coordination between recreation providers. There are gaps in baseline amenities such as accommodations

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and restaurants with better quality food. A lack of coordination within the County tourism market was the reason given for the gaps.

Poor signage was repeatedly emphasized as a reason why it is hard for people to find their way to parks and outdoor places within the county. Traffic, a dangerous and clogged Route 2 and limited accommodations are barriers to tourism. A few unique comments included lack of technology access and a hardware/sporting goods store in Sky Valley or Sultan.

Promoting Boeing as an anchor is a good idea for tourism according to the outdoor agencies as is promoting the Future of Flight, Comcast Arena and the Skagit Valley Tulips. The best future looking tasks that Snohomish County can tackle related to tourism is to reduce focus on Boeing and cross market between industries and sectors, while capturing the diversity of the county and encouraging destinations to do their own marketing.

Public Agencies

Attendees:

- *Kim Bedier, Comcast*
- *Catherine D'Ambrosia, Port of Everett*
- *Grant Dull, Lynnwood PUD*
- *Debbie Emge, City of Snohomish*
- *Karen Guzak*
- *Michele Phrohda, Smokey Point Chamber*
- *Bob Strickland*
- *Sue Strickland, Downtown Everett*
- *Dave Waggoner, Paine Field*
- *Bill Wheaton, Marysville and Tulalip Chamber*

When a person comes to Snohomish County, they are not coming to the County specifically, according to the public agency focus group participants. Instead, they are coming to a destination within Snohomish County. This group felt that the historic ambiance, riverfront and small town experiences made the area unique. The strong Seattle connection also proved to be an asset, as did the Tribal, shopping and Canadian sectors.

This group thought that people are attracted to Snohomish County for the shopping, Tulalip Casino, pumpkins in the fall, history, boating, water/beaches and the hiking/climbing. Business travel was also high on the list of attractions. Snohomish County is known for its art destinations, historic background, quaint neighborhoods, fairgrounds, Jetty Island, organic farmers, working land, day hikes, and aviation.

However, there are plenty of gaps that affect tourism, such as: a lack of museums; minimal activities for children; limited nightlife; a poor list of restaurants; a tourist attraction at the Port of Everett; and, limited quality news coverage. The lack of a local TV station proved to be a major topic of conversation.

They struggled with how Snohomish County could overcome the gaps. Perhaps they could do a better job of communicating about what is available and be clear about who and what the County really is and who and what it isn't. There also seems to be a lack of enthusiasm and a lack of true partnerships.

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The barriers cited to Snohomish County travel included no commercial aviation, I-5 traffic, distance between destinations, lack of public transportation, signage, limited walkability, no perception as a destination, no clear signage to draw Seattle to Vancouver travelers off of I-5, lack of cross marketing and signage overall.

The group expressed many strategies Snohomish County deploys that do work well, such as their consistency, inclusivity, media relations and an embrace of technology. There is a great need for hotel data and a correlation between promotion and heads in beds.

Tourism Bureau Board

There are a number of tourist attractions within Snohomish County, this group felt, that are the type of experiences that would attract them to the area if they were tourists. The list included shopping, the Boeing Tour, aviation, skydiving, agriculture, outdoor activities, and water sports.

In their minds, Snohomish County is known for Boeing, aviation, biotech and the Navy. The hidden assets of importance to this group included the historic charm of Snohomish County, the waterfronts of Mukilteo and Edmonds, Jetty Island, and the scenery and the historic charm and architecture of the cities.

While they stated that they feel Snohomish County doesn't get the respect it deserves, it was more apparent that most people don't tend to know what is in the area – and that includes residents. Even people that live in the County go outside of the area to have fun. Other gaps included a lack of rack cards and itineraries, a seasonal staff that doesn't have the skills to direct visitors to tourist activities, a lack of walkable cities, awareness, minimal sports facilities, lack of wineries and no kingpin attraction like the Pike Place Market.

Transportation is at the top of the list of major impediments, from the lack of light rail and easy wayfinding off I-5 to area attractions outside the Interstate corridor. The County's inability to site its Visitor Information Centers at the rest areas was also mentioned as a tourism barrier.

What can the County do about these issues? Improve signage and technology promotion to make it easier for people to find their way to attractions, off I-5 and throughout the County. The County should continue to work closely with the State to make legislators aware how important tourism is to the local economies. They can also help attract good hotels and restaurants.

The County can also do more to promote Boeing, create an agricultural tourism sector, develop an outdoor adventure center and create more targeted visitor information areas in forest areas. Year-round funding for small organizations and easier access to funds were also important points made by this group. It seemed like there was confusion about how the funding worked and what needed to happen to strengthen funding strategies. A special effort to help people within the cities better understand what is required within the funding mechanism and how to access the dollars for full benefit.

What's a good next step for the County? Promotion was the most evident areas of focus, but the focus group expressed it was promotion of anchor attractions and shoulder season activities that were most important. The winter activities need more attention. And, the County needs to do more to bring in big events and work with meeting planners to garner better convention attendance.

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The closing point from the session related to branding. If the recommendations from this report relate to branding, then the County needs to provide additional funding outside of the existing Tourism Bureau contract to facilitate that activity.

Online Survey Outcomes

96 people completed the online survey and answered the 20 different questions. The questions in the online survey were different than the focus group questions because they were modified to adapt to the online format. Respondents were from more than 14 sectors, except aviation, retail, limited service dining, specialty food services, recreation, gambling, marinas and tours. Industry sectors covered included: government, chambers of commerce, non profit or community or organizations, outdoor recreation, hotels, lodging, full-service restaurants, arts, heritage organizations, transportation, wineries and breweries, meeting venues, tourism facilities and miscellaneous. A review of the results provides this data:

- Hiking, parks, water sports, the Boeing Tour and waterfront offerings are the top five appealing attractions
- Shopping, Boeing Tour, casinos, Future of Flight and Seattle Premium Outlets were the top five well known attractions
- 62% of respondents do not track data on who visits their business or organization compared to 24% that did and 14% that did not
- Of those that do track data, 43% use online surveyed
- Only 39% track data on where their visitors come from and of those people 39% use visitor log books, 32% use website analytics, 26% use online surveys, 11% use focus groups and 13% use e-newsletters
- 48% said their visitors come from Snohomish County while 26% come from other counties in Washington, 4% from British Columbia, 12% from other states and 1% from international locations. The balance came from other locations.
- The top five marketing activities that the Snohomish County Tourism Bureau conducts are: website, garnering publicity, Visitor Information Centers, brochures and Search Engine Optimization
- Garnering publicity is the number one marketing task that that Snohomish County Tourism should do to promote County tourism
- The top five ways customers find various businesses is by Search Engines, publicity, corporate websites, Visitor Information Centers and Social media
- The Internet is the number one place that businesses advertise

Respondents were from a diverse group of ZIP codes. The survey proved to be a positive way to garner input on both popular and hidden assets for the Master Asset Inventory. Answers additional questions provided perspective about tourism challenges and gaps, specific advertising locations and more detail on how guests find businesses.

One-on-One Interviews

The one-on-one interview data collection process was extensive and the outcomes of this process have been key to garnering input for strategies and recommendation development. The majority of the one-on-one interviews analysis will be included in the Master Asset Inventory Report. The full roster of one-on-one interviews will be included in the final Snohomish County Tourism Plan.

Appendix C: Tourism Market Analysis

OVERVIEW

Measuring regional tourism activity is challenging, as direct visitor counts are not typically available. As a result, economic activity that parallels increases or decreases in visitors are used as proxy measures for the size and changes in tourism activity.

Specifically, this analysis assesses the Snohomish County tourism market and recent trends utilizing employment data for tourism-related industries, visitor spending estimates from Dean Runyan Associates, and lodging statistics from Smith Travel Research. When possible, comparisons are made to trends in the larger region and in nearby counties.

EMPLOYMENT

Snohomish Employment by Sector

The “tourism sector” is difficult to define precisely because it is a broad industry that serves local residents as well as visitors from out of the area. For this analysis, we use the Puget Sound Regional Council’s (PSRC) definition of the tourism sector, which defines the sector by a list of NAICS (North American Industry Classification System) codes representing businesses that serve out-of-area visitors. This study uses the Prosperity Partnership definitions to remain comparable with the tourism study of the four-county region (King, Snohomish, Pierce, and Kitsap Counties) conducted in 2008. Other studies, including Dean Runyan’s work for Washington State, and the Snohomish County Blueprint 2015 published by the Workforce Development Council of Snohomish County, define the tourism sector differently and report different figures for tourism employment and spending. Employment figures used in this analysis represent covered employment (jobs covered by unemployment insurance).

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Exhibit 1

Snohomish County Tourism Sector Employment

Tourism Sector	Employment					Change		Pre-Recession	Recession
	2002	2007	2008	2009	% of Total	2002-2009	AAGR 2002-2009	AAGR 2002-2007	AAGR 2008-2009
Tourism Sector	6,798	8,571	8,551	7,542	51.9%	744	1.5%	4.7%	-11.8%
Full-Service Restaurants	1,551	2,789	3,023	3,819	26.3%	2,268	13.7%	12.5%	26.3%
Gambling	749	1,015	1,113	974	6.7%	225	3.8%	6.3%	-12.5%
Hotels and Motels	422	636	600	569	3.9%	147	4.4%	8.5%	-5.2%
Drinking Places	359	444	442	371	2.6%	12	0.5%	4.3%	-16.1%
Golf Courses	216	287	334	323	2.2%	107	5.9%	5.8%	-3.3%
Performing Arts	353	227	243	306	2.1%	-47	-2.0%	-8.5%	25.9%
Other Recreation	306	252	294	240	1.7%	-66	-3.4%	-3.8%	-18.4%
Travel Arrangement	78	117	89	80	0.6%	2	0.4%	8.4%	-10.1%
Spectator Sports	*	78	86	64	0.4%	*	*	*	-25.6%
Amusement Parks and Arcades	56	58	61	63	0.4%	7	1.7%	0.7%	3.3%
RV Parks	21	52	57	59	0.4%	38	15.9%	19.9%	3.5%
Museums, Historic Sites	55	57	47	51	0.4%	-4	-1.1%	0.7%	8.5%
Other Transportation	44	49	43	46	0.3%	2	0.6%	2.2%	7.0%
Marinas	17	*	31	18	0.1%	1	0.8%	*	-41.9%
Independent Artists	*	0	*	*	*	*	*	*	*
Sightseeing Transportation	*	*	*	*	*	*	*	*	*
Other Accommodation	11,110	14,673	15,031	14,545	100.0%	3,435	3.9%	5.7%	-3.2%
Sector Total									

*= Suppressed Values

AARG = Average Annual Growth Rate

Source: Puget Sound Regional Council, 2010; BERK, 2010

Findings

- Total tourism-related employment was 14,545 in 2009. This accounts for approximately 6% of the 241,569¹ total jobs covered by unemployment insurance in Snohomish County.
- Overall, tourism-related employment in Snohomish County is down moderately (3.2%) from 2008 to 2009 as a result of the recession, reflecting the national trend of cutbacks in personal consumption on tourism.
- Full-Service restaurants make up the largest share of the County's tourism sector employment, with 52% of tourism sector jobs in 2009.
- Casino employment is the other sizable tourism sector in the County. It has grown 13.7% since 2002, which helped mitigate employment losses in 2009. Casino hotel employment is included in the gambling sector and not the hotel and motel sector. As a result, the Gambling sector employment is likely inflated while Hotel and Motel sector employment is underrepresented.
- According to the Tulalip Tribe, in 2010, the Tulalip Casino and Resort has a staff of approximately 2,000. About 80% of the staff is non-tribal members.

¹ Puget Sound Regional Council, 2009

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Appendix C: Tourism Market Analysis

Wages

The following exhibits describe the inflation adjusted average annual wages paid for employment in tourism-related sectors.

Exhibit 2

Snohomish County Average Annual Wage by Sector (2009\$)

Tourism Sector	2002	2007	2008
Transportation			
Other Transportation	\$23,281	\$23,634	\$22,455
Sightseeing Transportation	*	*	*
Administrative and Support			
Travel Arrangement	\$35,901	\$53,877	\$49,224
Arts, Entertainment, and Recreation			
Performing Arts	\$15,198	\$16,996	\$16,686
Spectator Sports	\$21,080	\$31,209	\$33,256
Independent Artists	\$14,039	*	\$10,998
Museums, Historic Sites	\$17,563	\$26,034	\$26,137
Amusement Parks and Arcades	*	\$9,981	\$8,126
Gambling	\$38,499	\$38,448	\$39,074
Golf Courses	\$25,145	\$20,238	\$21,522
Marinas	\$31,044	\$37,201	\$31,614
Other Recreation	\$12,615	\$14,576	\$16,060
Accommodation and Food Services			
Hotels and Motels	\$16,523	\$19,028	\$18,546
Other Accommodation	*	*	*
RV Parks	\$23,491	\$27,126	\$22,772
Full-Service Restaurants	\$16,967	\$17,803	\$16,684
Drinking Places	\$14,414	\$15,183	\$14,911
Sector Total	\$20,567	\$22,544	\$22,195
* Suppressed Values			

Source: Puget Sound Regional Council, 2010; BERK, 2010

Findings

- Tourism related sectors in Snohomish County paid \$335,880,768 in total wages in 2008.
- Overall, wages for tourism sector jobs are considerably lower than the 2008 countywide average of \$46,175².
- Jobs in the Travel Arrangement and Gambling sectors pay the highest wages of all tourism sectors.

² Employment Security Department, 2010

Regional Comparison

The following two exhibits compare Snohomish County employment and wages in tourism-related sectors with those in the four-county region comprised of King, Snohomish, Pierce, and Snohomish Counties; Snohomish County alone; King County alone; and Pierce and Kitsap Counties together.

Exhibit 3

Regional Tourism Sector Employment

	Employment				Change			
	Pre-Recession		Recession		Pre-Recession		Recession	
	2002	2007	2008	2009	2002-2007	AAGR 2002-2007	2008-2009	AAGR 2008-2009
Four-county Total	99,058	116,946	118,943	111,988	17,888	3.4%	-6,955	-5.8%
Snohomish County	11,110	14,673	15,031	14,545	3,563	5.7%	-486	-3.2%
King County	69,397	79,868	80,931	75,580	10,471	2.9%	-5,351	-6.6%
Pierce & Kitsap Counties	18,551	22,405	22,981	21,863	3,854	3.8%	-1,118	-4.9%

Source: Puget Sound Regional Council, 2010; BERK, 2010

Note: The Four-county Total includes King, Snohomish, Pierce, and Snohomish Counties

Exhibit 4

Regional Tourism Sector Average Annual Wage

	2002	2007	2008	AAGR 2002-2008
Four-county Average	\$28,818	\$28,575	\$27,280	-0.9%
Snohomish County	\$20,567	\$22,544	\$22,195	1.3%
King County	\$32,607	\$32,043	\$30,415	-1.2%
Pierce & Kitsap Counties	\$19,582	\$20,162	\$19,563	0.0%

Source: Puget Sound Regional Council, 2010; BERK, 2010

Note: The Four-county Total includes King, Snohomish, Pierce, and Snohomish Counties

Findings

- Relative to other counties in the region, the Snohomish County tourism sectors grew faster before the recession, and have not shrunk as much King and Pierce/Kitsap Counties' comparable sectors during the recession. A shift to value destinations (i.e. "stay-cations") may have benefited Snohomish County more than King County, for example, which likely sees a higher percentage of visitors from outside the region and state.
- The average inflation adjusted wage for tourism sector jobs in Snohomish County increased at an average annual rate of 1.3% from 2002 to 2008. Over the same period, wages decreased by 1.2% in King County and were flat for Pierce and Kitsap Counties.

Location Quotients

Location quotients compare the local concentration of jobs in different sectors to a reference geography – usually the nation or a state. When a region has a high concentration of jobs relative to the reference geography, it indicates a strength that can be built upon, particularly when the sector is seen to be growing in size over time. A value of 1.0 signifies that the sector possesses the same level of employment concentration as the reference geography. A value above or below 1.0 signifies that the sector possesses a concentration level that is either greater or lesser than the base area.

Exhibit 5

Snohomish County Location Quotients by Sector, 2008 & 2009

	Location Quotient (County to Region)		Location Quotient (County to Nation)	
	2008	2009	2008	2009
Transportation				
Other Transportation	0.2	0.2	0.3	0.3
Sightseeing Transportation	*	*	*	*
Administrative and Support				
Travel Arrangement	0.4	0.3	0.7	0.6
Arts, Entertainment, and Recreation				
Performing Arts	0.7	0.7	1.5	1.5
Spectator Sports	0.3	0.4	0.3	0.3
Independent Artists	0.6	0.3	0.3	0.2
Museums, Historic Sites	0.2	0.2	0.1	0.1
Amusement Parks and Arcades	1.2	1.1	0.3	0.2
Gambling	2.1	2.7	7.0	9.3
Golf Courses	1.0	0.9	0.6	0.6
Marinas	0.9	1.1	0.7	0.8
Other Recreation	0.6	0.9	0.6	0.8
Accommodation and Food Services				
Hotels and Motels	0.4	0.4	0.4	0.4
Other Accommodation	*	*	*	*
RV Parks	1.7	2.2	0.6	0.6
Full-Service Restaurants	0.9	0.9	1.0	0.9
Drinking Places	0.9	0.9	0.9	0.9

* Suppressed Data

Source: Puget Sound Regional Council, 2010; BERK, 2010

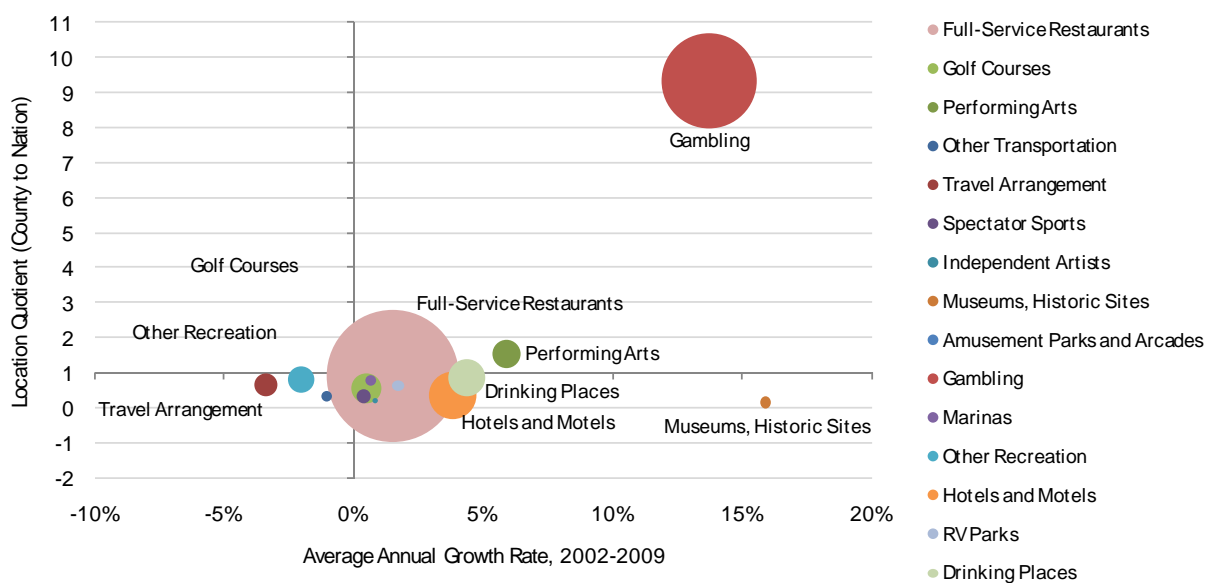
Note: The Region includes King, Snohomish, Pierce, and Snohomish Counties

Reading the chart below, the bottom axis represents the average annual employment growth rates (AAGR) for each sector. Sectors to the right of the vertical line are growing; those to the left are shrinking. The vertical axis represents the employment concentration or location quotient for each sector compared to the reference geography. The size of the bubbles indicates the number of employees in each sector.

From an economic development perspective, large, highly concentrated sectors that are not growing very fast are stable sectors. Highly concentrated and fast growing sectors – often smaller in size – can be the emerging sectors that need to be supported with recruitment and expansion strategies.

Exhibit 6

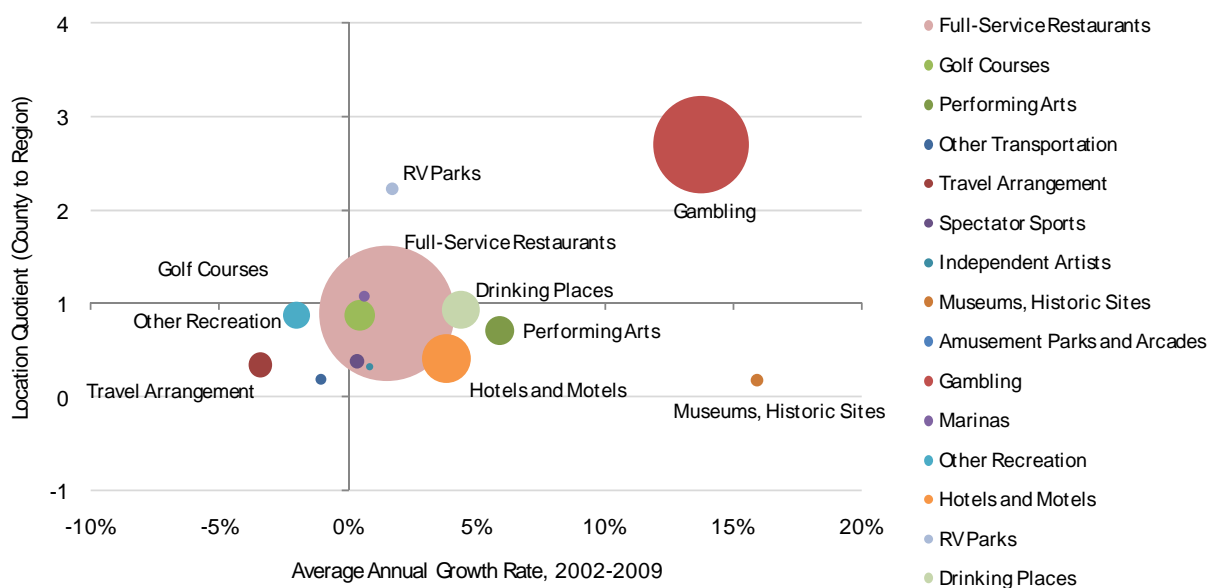
Snohomish County Tourism Sector Employment Compared to Nation



Source: Puget Sound Regional Council, 2010; Tulalip Tribe, 2010; BERK, 2010

Exhibit 7

Snohomish County Tourism Sector Employment Compared to Region



Source: Puget Sound Regional Council, 2010; Tulalip Tribe, 2010; BERK, 2010

Notes: The Region includes King, Snohomish, Pierce, and Snohomish Counties. Casino hotel employment is included in the gambling sector and not the hotel and motel sector. As a result, the Gambling sector employment is likely inflated while Hotel and Motel sector employment is underrepresented.

Findings

Compared to the nation and the region (King, Kitsap, and Pierce Counties – the remaining counties in the four-county region) Snohomish County is primarily strongest in the gambling sector. The County has a high concentration of gambling related jobs and this sector has grown considerably since 2002.

Growing Sectors

High Concentration

- **Gambling:** The County's gambling sector has been growing at nearly 14% a year since 2002.
- **RV parks** are highly concentrated compared to the region. It is not a fast growing sector, however.

Average Concentration

- **Restaurants** and **drinking establishments** have comparable concentrations to the region and nation. Both had an average annual growth rate of 1%-4% since 2002.

Low Concentration

- **Hotels and motels; museums and historic sites; performing arts** (above average nationally); and **golf courses** have below average clustering compared to the region.
- **Museums and historical sites** and **performing arts** have experienced considerable growth since 2002.

Shrinking Sectors

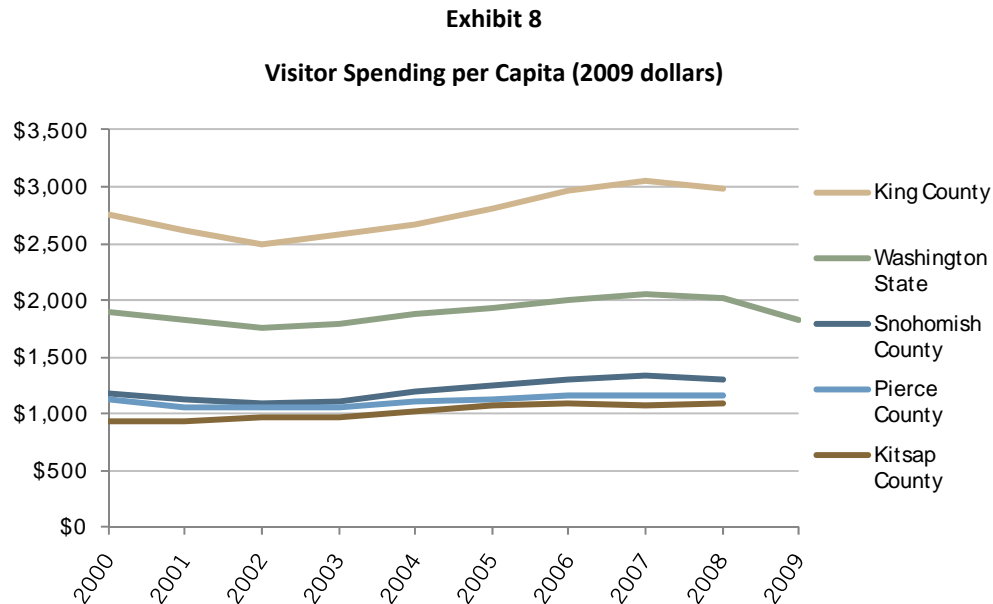
Low Concentration

- **Travel arrangements** and **other recreation** are the two sizable sectors that shrank over this period. Both these sectors had below average clustering compared to the nation or other three counties in the region.

VISITOR SPENDING³

Spending per Capita

Exhibit 8 below shows the total spending by visitors on a per capita basis. Higher spending per capita indicates that the location is drawing more visitor dollars to the area relative to its population base.



Source: Dean Runyan, 2010; BERK, 2010

Findings

- Lower visitor spending per capita in Snohomish County indicates it attracts fewer visitors from outside the county compared to the King County or the State overall.
- Spending varies with the economy. Snohomish County, King County and the State show a similar trend over the last decade with decreased spending during recessions.
- Spending decreased 9% for the State overall from 2008 to 2009

³ Visitor spending is for tourism sectors based on Dean Runyan Associates data and methodology. Dean Runyan-defined tourism sectors are different than the PSRC-defined tourism sectors used in the Employment section above.

Spending by Commodity

The following exhibits describe inflation-adjusted spending in visitor-related sectors by commodity type.

Exhibit 9

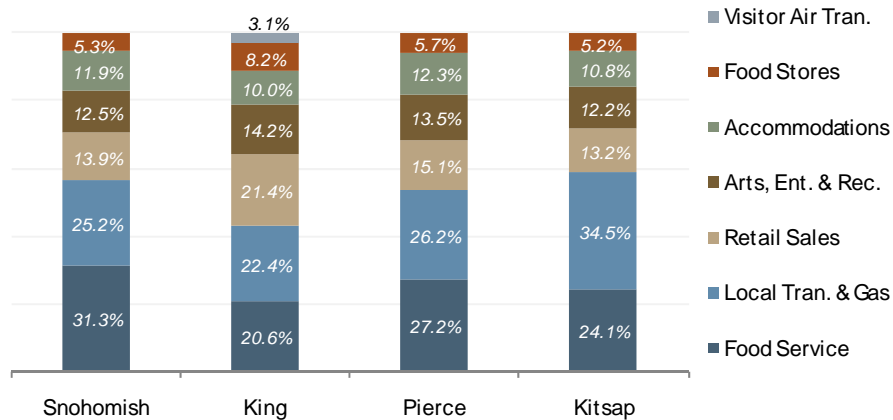
Snohomish County Visitor Spending by Commodity in Millions (2009 \$)

Commodity	2000	2005	2008	Percent of Total, 2008	AAGR 2000-2008
Food Service	\$157.75	\$220.93	\$283.08	31.3%	7.6%
Local Tran. & Gas	\$185.30	\$216.98	\$228.05	25.2%	2.6%
Retail Sales	\$134.79	\$132.36	\$125.75	13.9%	-0.9%
Arts, Ent. & Rec.	\$108.85	\$116.01	\$113.03	12.5%	0.5%
Accommodations	\$81.92	\$88.46	\$107.77	11.9%	3.5%
Food Stores	\$39.72	\$44.78	\$47.78	5.3%	2.3%
Visitor Air Tran.	\$0.00	\$0.00	\$0.00	-	-
Total	\$708.20	\$819.64	\$905.45	100.0%	3.1%

Source: Dean Runyan, 2010; Bureau of Economic Analysis, 2010; BERK, 2010

Exhibit 10

Visitor Spending by Commodity, 2008



Source: Dean Runyan, 2010; BERK, 2010

Findings

- Total visitor spending in Snohomish County in 2008 was \$911.6 million (or \$905.45 million in 2009 dollars). For reference, Snohomish County had \$10.7 billion in taxable retail sales in 2008⁴ for all NAICS categories. Visitor spending figures are not directly comparable to taxable retail sales recorded, however. Dean Runyan uses a proprietary methodology to estimate visitor spending that includes spending not factored into the TRS totals, such as airfare for example.
- Overall, visitor spending has been increasing in Snohomish County.

⁴ Washington Department of Revenue, 2008.

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Appendix C: Tourism Market Analysis

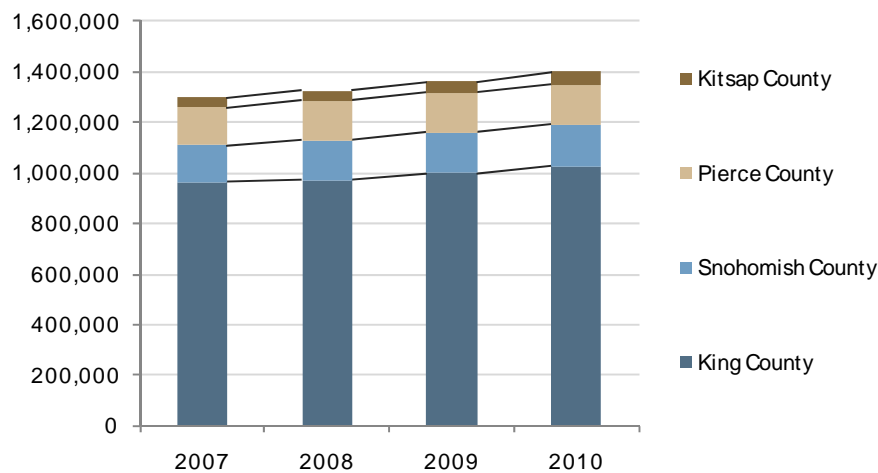
- Visitors to Snohomish County spend the most on food and transportation/gas which total 56% of all visitor spending. Spending by these categories is growing, with food service increasing by an average annual rate of 7.6% from 2000-2008 and local transportation/gas by 2.6% over the same timeframe.
- Visitors to Snohomish County spend a larger share on food service than in other counties in the region.
- Retail sale spending is the only commodity type that decreased from 2000 to 2008.

LODGING TRENDS

Supply

The following exhibit describes the supply of rooms in Snohomish County and other counties in the region. Supply is defined as the number of rooms available per day by days in the month, or in other words: the total monthly room nights. Totals do not include bed and breakfasts and other small facilities.

Exhibit 11
Room Supply, June 2007-10



Source: Smith Travel Research, 2010; BERK, 2010

	Winter (December)			Summer (June)			
	2007	2008	2009	2007	2008	2009	2010
Washington State	2,509,512	2,578,952	2,632,644	2,409,690	2,472,960	2,524,620	2,586,600
Region	1,355,010	1,395,341	1,415,553	1,297,530	1,326,570	1,362,300	1,399,350
King County	1,000,463	1,019,528	1,041,228	964,230	970,830	1,000,050	1,026,690
Snohomish County	152,148	163,618	163,649	144,270	158,370	158,370	164,790
Pierce County	159,867	164,858	163,339	150,930	156,150	158,070	158,100
Kitsap County	42,532	47,337	47,337	38,100	41,220	45,810	49,770

Source: Smith Travel Research, 2010; BERK, 2010

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Appendix C: Tourism Market Analysis

Findings

- The hotel/motel room supply across the four county region has increased every year for the last four years. Most of this growth (61% of all new rooms) has been in King County.
- In 2009, Snohomish County rooms represented 12% of the total supply for the four-county region.
- The room supply in Snohomish County grew by 14% from 2007 to 2009.

Occupancy

The following exhibits show occupancy and the average daily rate for hotels in the Puget Sound and the State overall.

Exhibit 12

Percent Occupancy

	Winter (December)			Summer (June)			
	2007	2008	2009	2007	2008	2009	2010
Washington State	48.1	42.2	42.9	76.8	74.1	67.2	69.6
Snohomish County	58.4	44.9	47.1	80.6	72.3	64.5	77.1
King County	51.7	48.0	47.2	82.9	80.0	73.3	75.7
Pierce County	47.2	40.2	42.5	72.8	71.6	64.7	72.4
Kitsap County	50.3	40.7	41.6	72.7	71.8	64.7	55.9

Source: Smith Travel Research, 2010; BERK, 2010

Findings

- In 2010, the occupancy rate in Snohomish County is higher than the State overall or any of the other counties in the four county region.
- Occupancy in King County has steadily decreased as supply has increased.

Exhibit 13

Average Daily Rate

	Winter (December)			Summer (June)			
	2007	2008	2009	2007	2008	2009	2010
Washington State	\$95.15	\$95.63	\$87.21	\$105.05	\$110.28	\$103.01	\$99.53
Snohomish County	\$84.91	\$85.79	\$79.78	\$87.65	\$95.71	\$85.61	\$83.38
King County	\$117.52	\$115.34	\$99.90	\$132.37	\$138.89	\$123.75	\$117.07
Pierce County	\$79.34	\$82.54	\$74.95	\$79.78	\$85.61	\$84.64	\$78.44
Kitsap County	\$87.86	\$85.01	\$81.02	\$91.79	\$98.89	\$93.04	\$88.97

Source: Smith Travel Research, 2010; BERK, 2010

Findings

- The average daily rate for all hotels/motels in Snohomish County is lower than in King County and Kitsap County, reflecting that Snohomish County lodging is a more “value” oriented hotel/motel market compared to its neighbors.
- Snohomish County average daily rate is also lower than the State average in both December and June. Only Pierce County has a lower average daily rate than Snohomish County.

Appendix D: Tourism Funding Summary

INTRODUCTION

This document describes two funding mechanisms that Snohomish County either currently uses or is planning to use to support and promote its tourism industry:

- 1. Lodging Tax.** Under Washington State law, the lodging tax can be levied by counties, cities, or Public Facilities Districts. The 2000 *Snohomish County Strategic Plan for Tourism Development and Marketing* established the development of significant new tourism attractions through capital investment as a strategic priority. To provide the financing for these investments in the County's tourism infrastructure, a countywide Public Facilities District (PFD) was created and partnerships with city-level PFDs were developed.
- 2. Tourism Promotion Area.** A Tourism Promotion Area (TPA) is an established geographic boundary, within which lodging establishments can self-impose an additional nightly fee on each room-night. TPA assessment revenues can be used to fund tourism promotion and development activities.

Snohomish County has not yet established a TPA. The lodging industry has proposed the idea, and the County Council has passed a resolution stating their intent to support the effort.

The revenue sources, purpose, and uses of these two tourism funding mechanisms are described in more detail in the following sections.

1. LODGING TAX

The lodging tax fund is a dedicated fund authorized by state and county statute that taxes hotel and motel overnight stays and uses the receipts for the purpose of developing and promoting tourism in Snohomish County.

Source of Funds

Snohomish County currently levies and collects the legal maximum lodging tax. The lodging tax fund has two sources, both based on taxes levied on lodging fees:

- 1. The Small Fund.** This Fund is supported by a credit to the County of one-third of the State's sales tax collected on lodging, which totals 2% of each eligible sale. This fund is also known as the "Hotel-Motel Tax Fund" or "The First Two Percent." For the purposes of this document, it will be referred to as The Small Fund.
- 2. The Large Fund.** This Fund is supported by an additional 2% tax levied on the sale of lodging that accrues directly to the County. This fund is also known as the "Regional Tourism Tax Fund" or "The Second Two Percent." For the purposes of this document, it will be referred to as The Large Fund.

The County does not receive revenues from the sale of lodging that takes place on tribal land. A current issue nationwide is the collection of lodging tax revenues from online bookings. The County is receiving tax revenues from the sale of lodging through online travel websites, though some of this may be based on wholesale rather than retail costs.

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The revenue source and statutes regulating each of these funds are described in more detail below.

The Small Fund

Small Fund revenues come from a special excise tax authorized by RCW 67.28.180 and RCW 67.28.1801, and enacted by Snohomish County Code (SCC) 4.40.010. These statutes allow Snohomish County to levy and collect a special excise tax not to exceed 2% on the sale of lodging within County boundaries that is subject to sales tax. The revenues are given to the County as a credit against the state sales tax on each eligible lodging sale. Snohomish County levies the maximum allowable 2%, meaning the County earns \$0.02 for each \$1.00 paid for eligible lodging. The County receives its allocations from the State on a monthly basis.

Money in the Small Fund that has not yet been withdrawn may be invested by the County in interest-bearing securities, with earnings returned to the Fund.

This revenue source is called the Small Fund because the County does not receive the revenues if the lodging sale takes place within a city that already levies this excise tax. The following cities levy this tax locally, and so Snohomish County does not receive this revenue from lodging sales in the following jurisdictions:

- City of Arlington
- City of Bothell
- City of Edmonds
- City of Everett
- City of Lynnwood
- City of Marysville
- City of Monroe
- City of Mountlake Terrace
- City of Mukilteo
- City of Snohomish

The Large Fund

Large Fund revenues come from an excise tax authorized by RCW 67.28.181 and enacted by SCC 4.41.010. These statutes allow the County to levy and collect an excise tax not to exceed 2% on the sale of lodging within County boundaries that is subject to sales tax. This tax is in addition to other taxes levied on lodging fees, and accrues to the County regardless of which jurisdiction the lodging sale takes place. Snohomish County levies the maximum allowable 2%, meaning the County earns \$0.02 for each \$1.00 paid for eligible lodging.

Money in the Large Fund that has not yet been withdrawn may be invested by the County in interest-bearing securities, with earnings returned to the Fund.

Fund Administration

State and county statutes require Snohomish County to create a dedicated fund to receive lodging tax revenues, and that the revenues are expended only on eligible activities as described in the following section. The County Executive is responsible for administering both the Large and Small Funds, and for appointing a fund manager for each.

RCW 67.28.1817 requires that Snohomish County, as a jurisdiction with a population greater than 5,000, also establish a Lodging Tax Advisory Committee (LTAC) to impose or make changes to the rate or use of the lodging tax. The statute requires that LTAC consist of at least five members appointed by the County, two of which must be representatives of businesses required to collect the tax and two of which must be involved in activities authorized to be funded by the tax. If the County's LTAC consists of more than five members, the number of members from each of those two groups must remain equal to one another. The final member must be an elected official of the County, and this member will serve as Committee Chair. Membership will be reviewed and changed as necessary.

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on an annual basis by the appointing authority. The LTAC may also include one non-voting member who is an elected official of a city or town in the County.

The purpose of LTAC is to advise the County decision-makers on how to spend fund revenues. Snohomish County's LTAC currently consists of the following members:

- One County Councilmember (serving as Chair)
- Two lodging industry representatives
- Two tourism industry representatives
- The Snohomish County Tourism Board Director (ex-officio member)

Allowed Uses of Lodging Tax Funds

Use of the Large and Small Funds is regulated by RCW 67.28.1815 and RCW 67.28.1816. RCW 67.28.1815 states that the revenues must be used for the purpose of paying costs of tourism promotion, acquisition of tourism-related facilities, or operation of tourism-related facilities. They may also be used to fund a multijurisdictional tourism-related facility.

RCW 67.28.1816 is a temporary statute that expires June 30, 2013. It allows revenues to be used for the following additional purposes:

- The marketing and operations of special events and festivals.
- To support the operations and capital expenditures of tourism-related facilities owned by nonprofit organizations.

This statute requires that local jurisdictions using these revenues submit an annual economic impact report to the Washington State Department of Commerce. This report must include a detail of expenditures, as well as:

- The total revenue received.
- The list of festivals, special events, or nonprofits that received funds.
- The amount of revenue expended on each festival, special event, or tourism-related facility.
- The estimated number of each of the following generated per festival, special event, or tourism-related facility:
 - tourists
 - persons traveling over fifty miles to the destination
 - persons remaining at the destination overnight
 - lodging stays

Washington State's Joint Legislative Audit and Review Committee (JLARC) will report to the Legislature and the Governor on the use and economic impact of lodging tax revenues by local jurisdictions since January 1, 2008 to support festivals, special events, and tourism-related facilities; and the economic impact generated by them. The report will be turned in September 1, 2012.

The Small Fund

The Small Fund is additionally regulated by SCC 4.40.050, which says Small Fund revenues may only be used for the following purposes:

- Acquisition, construction, improvement, or operation of convention center facilities, stadium facilities, or performance and/or visual arts center facilities.
- Payment of General Obligation or revenue bonds used for the above purposes.
- Advertising, publicizing, or distributing information for the purpose of attracting visitors and encouraging tourist expansion. This can include promotional materials, development of strategic tourism plans, and other such uses.

SCC 4.40.060 encourages the fund administrator to define eligibility of sponsors and projects broadly to encourage wide participation and innovative proposals.

The Large Fund

The Large Fund is additionally regulated by SCC 4.41.030, which says the funds may be used for:

- Acquiring or operating, either jointly or individually, tourism-related facilities.
- To pay or secure general obligation or revenue bonds issued for the purposes referenced above.
- To develop strategies to expand tourism within the County.
- To support comprehensive regional marketing for Snohomish County tourism.

Use of Lodging Tax Funds in Snohomish County

The Small Fund

All dollars in the Small Fund not used for fund administration (capped at 12% of annual appropriations) are distributed through a competitive award process (see page 8). Although the Small Fund can be used for many different purposes, in practice, the Small Fund has primarily been used in Snohomish County to support local tourism promotion initiatives throughout the County including brochures and advertising. These promotional initiatives are often a small piece of a larger project, such as an event or festival that needs marketing support.

Use of Snohomish County Small Fund dollars for marketing purposes has traditionally been allowed for advertising and promotional campaigns in communities more than 50 miles away from the site of the attraction. The intention of this requirement has been to draw visitors more likely to stay overnight in the County's hotels and motels, which is desirable both for the additional spending overnight visitors bring, and because these visits directly contribute to the Lodging Tax fund, to some degree replenishing the dollars that were expended in the marketing effort. Attracting overnight visitors is not currently a requirement of either State or County law, even though it has been the practice for some time. Although it is not an eligibility requirement, it is part of the bonus selection criteria of the Small Fund application process (see Exhibit 4).

If not all of the Small Fund revenues are spent in a given year, the excess funds accumulate. The current fund reserve is approximately \$1.0 million. There has not been a deliberate intent by the LTAC to run a surplus, but these funds have accumulated because fund revenues have been greater than awards allocated.

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Exhibit 1 shows the award history for the Small Fund.

Exhibit 1
Small Fund Project Award History (2005-2009)

	2005	2006	2007	2008	2009*
Total Small Fund Revenues	\$247,994	\$268,560	\$332,512	\$334,650	\$336,866
Projects Requested	30	26	27	30	18
Projects Awarded	24	25	26	28	15
% of projects awarded	80%	96%	96%	93%	83%
Dollars Requested**	\$362,912	\$342,699	\$379,805	\$494,256	\$316,465
Dollars Awarded**	\$205,416	\$219,268	\$251,420	\$285,509	\$243,206
% of dollars awarded	57%	64%	66%	58%	77%
Total Sponsor Match	\$1,152,633	\$1,089,511	\$1,511,187	\$1,601,704	\$904,900
Net Revenue	\$42,578	\$49,292	\$81,092	\$49,141	\$93,660

* 2009 data does not include the spring funding round.

**These amounts include 12% administrative costs

Source: Snohomish County, 2010; and BERK, 2010.

The Large Fund

The Large Fund has emerged as a resource for projects of countywide benefit, with a strong emphasis on funding capital facilities, which was a primary strategy of the 2000 *Strategic Plan for Tourism Development and Marketing*. In addition to assisting with the acquisition and construction of several regional tourism facilities (often in partnership with the Snohomish County PFD or a city-level PFD), Large Fund revenues have also been dedicated to supporting an integrated program of local, regional, national, and international tourism promotion through the Snohomish County Tourism Bureau.

The Fund was created in 1994 by the County Council to support large tourism-related development projects of regional significance. The intent at the time was to allocate the funds evenly for three purposes:

- Snohomish County Tourism Bureau
- Everett's Memorial Stadium Improvements
- A regional tourism project in South County

The Bureau was founded in 1995, and Memorial Stadium improvements were completed in 1997. By the early 2000s, the Large Fund had accumulated a substantial reserve. To distribute these funds, the LTAC worked with County stakeholders to develop a strategy and program guidelines that aligned with the goals of the 2000 *Strategic Plan for Tourism Development and Marketing*, culminating in a competitive funding process that awarded long-term funding to the Comcast Arena (also in Everett) and the Lynnwood Convention Center (in South County), via the Lynnwood PFD.

Currently, the fund is being distributed as described below. The distribution percentages used are net of the County's Large Fund administration costs, which are capped at 4% annually, and any interest income.

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- **Contracting with the Snohomish County Tourism Bureau.** The Large Fund distribution to the Snohomish County Tourism Bureau is set through contract. This distribution is used to support the administration and operation of the Bureau, and to fund the Bureau's selected marketing and promotion campaigns, including projects such as advertising, web site operation, and brochure development.
- **Assisting with the acquisition and construction of regional tourism facilities.** Remaining Large Fund revenues are used to support regional tourism facilities, distributed evenly between the Everett area and the South County area to projects selected in the early 2000s. These obligations are described below:
 - **South County Share.** A portion of the Large Fund revenues is reserved for the South County area. Currently, this money is distributed to the Lynnwood PFD, which uses it to support the Lynnwood Convention Center. The Lynnwood PFD receives distributions according to a formula set in an inter-local agreement, up to a maximum of one-third of Large Fund revenues. In years where the scheduled amount is below the one-third maximum, the difference is put into a reserve fund.

The Lynnwood PFD also receives funds from the Snohomish County PFD and from city lodging taxes.

- **Everett Share.** This money is dedicated to paying off the bonds used to fund Everett's Memorial Stadium and the Comcast Arena. This appropriation pays the debt service on the bonds, and also contributes to the required bond reserve, which will help pay the debt service when revenues are insufficient. The City receives the larger of the following amounts each year from the Large Fund:
 - An amount sufficient to pay for the Everett Memorial Stadium bond and its required reserve; or
 - An amount equal to the percentage of Large Fund revenues collected within the City of Everett, multiplied by net Large Fund revenues (including interest earned and less administrative costs)

In years where the bond service amounts exceed the formulaic distribution amount, the County has made intra-fund transfers to the City sufficient to service the bonds. All such intra-fund transfers are tracked, and reverse transfers to pay back these "loans" are made in later years when revenues are sufficient.

The Comcast Arena project was led by the Snohomish County PFD, which contributes funding from its own state-rebated sales tax revenue. Additionally, the Arena receives funds from operations and from City of Everett lodging taxes.

Current Balance and Commitments

The Large Fund currently has a surplus of approximately \$1.9 million. There is not currently a strategy for how much of a surplus the County would like to carry, or how surplus dollars should be used.

A portion of future Large Fund revenues are already committed to paying the debt service on the bonds identified above. Everett's bond debt service totaled about \$397,000 in 2010, and will increase according to a schedule, reaching \$728,000 in 2026 and being fully retired in 2027. Future funds are also committed to the Lynnwood PFD, according to the formula in the inter-local agreement.

Exhibit 2 shows a history of large fund revenues and obligations for the years 2002-2008. The revenues available for distribution have grown an average of 9% per year over the period, while the three ongoing obligations (Lynnwood, Everett, and the Bureau) have only grown by about 4% annually. This has resulted in increasing annual surpluses.

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Exhibit 2
History of Large Fund Revenues and Obligations (2002-2008)

	2002	2003	2004	2005	2006	2007	2008	Avg. Growth Rate
Tax Revenue	\$ 1,118,752	\$ 1,026,820	\$ 1,148,464	\$ 1,327,785	\$ 1,605,832	\$ 1,867,355	\$ 1,921,565	
Interest Earned	\$ 48,460	\$ 33,683	\$ 22,129	\$ 41,626	\$ 52,047	\$ 86,251	\$ 52,864	
Gross Revenue	\$ 1,167,212	\$ 1,060,503	\$ 1,170,592	\$ 1,369,411	\$ 1,657,879	\$ 1,953,606	\$ 1,974,429	
Adm in. Costs	\$ 26,086	\$ 14,711	\$ 24,091	\$ 25,158	\$ 14,238	\$ 36,690	\$ 43,152	
Revenue available for distribution	\$ 1,141,126	\$ 1,045,792	\$ 1,146,501	\$ 1,344,253	\$ 1,643,641	\$ 1,916,916	\$ 1,931,277	9.2%
<i>1/3 available for each group</i>	<i>\$ 380,375</i>	<i>\$ 348,597</i>	<i>\$ 382,167</i>	<i>\$ 448,084</i>	<i>\$ 547,880</i>	<i>\$ 638,972</i>	<i>\$ 643,759</i>	
Lynnwood PFD	\$ 400,000	\$ 416,000	\$ 432,640	\$ 449,946	\$ 467,943	\$ 486,661	\$ 506,128	4.0%
<i>Available share (1/3)</i>	<i>\$ 380,375</i>	<i>\$ 348,597</i>	<i>\$ 382,167</i>	<i>\$ 448,084</i>	<i>\$ 547,880</i>	<i>\$ 638,972</i>	<i>\$ 643,759</i>	
<i>Surplus (Deficit)</i>	<i>\$ (19,625)</i>	<i>\$ (67,403)</i>	<i>\$ (50,473)</i>	<i>\$ (1,862)</i>	<i>\$ 79,937</i>	<i>\$ 152,311</i>	<i>\$ 137,631</i>	
City of Everett	\$ 260,489	\$ 270,614	\$ 284,909	\$ 299,509	\$ 313,309	\$ 331,309	\$ 335,109	4.3%
<i>Available share (pro rata share)</i>	<i>\$ 208,082</i>	<i>\$ 173,224</i>	<i>\$ 190,751</i>	<i>\$ 199,712</i>	<i>\$ 288,934</i>	<i>\$ 366,074</i>		
<i>Surplus (Deficit)</i>	<i>\$ (52,407)</i>	<i>\$ (97,390)</i>	<i>\$ (94,158)</i>	<i>\$ (99,797)</i>	<i>\$ (24,375)</i>	<i>\$ 34,765</i>	<i>\$ (335,109)</i>	
<i>Amount available to VIC (1/3 - Everett)</i>	<i>\$ 119,886</i>	<i>\$ 77,983</i>	<i>\$ 97,258</i>	<i>\$ 148,575</i>	<i>\$ 234,571</i>	<i>\$ 307,663</i>		
Tourism Bureau	\$ 456,320	\$ 464,336	\$ 464,336	\$ 476,616	\$ 502,750	\$ 531,650	\$ 573,829	3.9%
<i>Available share (1/3 + VIC share)</i>	<i>\$ 500,262</i>	<i>\$ 426,581</i>	<i>\$ 479,425</i>	<i>\$ 596,659</i>	<i>\$ 782,452</i>	<i>\$ 946,635</i>	<i>\$ 643,759</i>	
<i>Surplus (Deficit)</i>	<i>\$ 43,942</i>	<i>\$ (37,755)</i>	<i>\$ 15,089</i>	<i>\$ 120,043</i>	<i>\$ 279,702</i>	<i>\$ 414,985</i>	<i>\$ 69,930</i>	
Total Surplus (Deficit)	\$ 24,317	\$ (105,158)	\$ (35,384)	\$ 118,182	\$ 359,639	\$ 567,296	\$ 516,211	

Additional Funding for Snohomish County Facilities

In addition to Large Fund dollars, many of Snohomish County's tourism and entertainment venues have benefited from Public Facilities District (PFD) funding, either from the County PFD or from a city-specific PFD, or from both. Exhibit 3 summarizes the PFDs in Snohomish County, noting both the countywide PFD and city-specific PFDs.

Exhibit 3
Snohomish County Public Facilities Districts

Public Facilities District	Funded Facilities
Snohomish County Public Facilities District	Everett Arena Lynnwood Public Facilities District (the Lynnwood Convention Center) Edmonds Centre for the Arts National Flight Interpretive Center (the Future of Flight Museum)
Edmonds Public Facilities District	Edmonds Centre for the Arts
Everett Public Facilities District	Comcast Arena Everett Events Center
Lynnwood Public Facilities District	Lynnwood Convention Center

Award Process and Criteria

The Small Fund

Small Fund revenues are distributed through a competitive award process. The County sponsors two application periods each year, during which eligible entities (non-profit organizations, public, or public private entities) submit proposals for project assistance. Applications must include descriptions of eligibility, scope of work, project timeline, letters of recommendation, estimated budget, available matching share, and an explanation of cooperative commitments.

The Lodging Tax Advisory Committee is responsible for reviewing applications and submitting recommendations for funding to the County Council, which makes the final project allocation decisions. Winning projects are then contracted for on a reimbursement basis. The LTAC first screens projects for eligibility and then uses the following selection criteria to rank eligible projects for recommendation to the Council. Each area is scored individually with total of 125 points available as shown in Exhibit 4 on the following page.

Exhibit 4
Scoring Criteria for Small Fund Project Proposals

Criteria	Points
Clarity. The proposal should clearly and concisely describe the project and how, if appropriate, the County-supported project will be integrated into a larger effort.	15
Strategic Plan. The project should clearly explain how it advances one or more strategies in the <i>Strategic Plan for Tourism Development and Marketing for Snohomish County</i> .	15
Cost-Effectiveness. The project should be an efficient, economical use of the County's funds.	15
Area of Impact. The application should describe how large of an area the project will impact.	10
Scale of Project. The project should be of an appropriate scale to be completed by the end of the award year.	10
Degree of Match. The applicant must demonstrate that it can supply at least 25% of the total project cost from funds other than the Small Fund. A higher match rate will improve a project's competitiveness.	10
Marketing. The application should describe how the project will be marketed and how that marketing will be coordinated with other community marketing and the Snohomish County Tourism Bureau's countywide marketing program.	10
Innovation. The project will be more competitive if it represents an unusual approach or moves the County's Hotel/Motel program in a useful new direction.	5
Cooperative Nature. The application should describe the type and degree of inter-organizational or inter-jurisdictional partnerships the project will incorporate.	5
Self-evaluation. The application should describe how the applicant will provide for an adequate method of evaluating the effects of the proposed project upon completion.	5
Off-season Development. The application should describe if the project will promote tourism development during the off-season (September 1 – June 30).	5
Overnight Visitorship. The application should describe if the project will attract overnight visitorship, and if possible, quantify the anticipated stays and offer a credible method for corroborating the projections.	10
Local Ordinance Funds. If the project originates from a jurisdiction with its own Hotel/Motel ordinance, the application should describe what degree of support the community has committed from its Hotel/Motel funds.	10
Total	125

The Large Fund

Snohomish County Tourism Bureau Programs

All tourism-related activities undertaken by the Bureau are funded and scoped through a contract with the County, approved and signed by the County Executive. The current contract covers a 5-year period from January 1, 2006 to December 31, 2010. The budget and operational plan for each year are included as attachments to the 5-year contract, and are updated on an annual basis.

The operational plan describes the actions that the Bureau will take during that year to achieve its goals, and the budget gives a more detailed cost estimate of each piece of the operational plan. The operational plan and the budget are split into supporting Visitor Services and Non-Visitor Services, with dollar amounts designated for each. The Bureau may reallocate up to 15% of the total funds within either budget at its discretion. If it would like to change the budget to a greater extent, it must get approval from the County Executive.

Separately-Funded Capital Projects

The County Executive and the County Council must both approve the dedication of funds to any other capital projects. Of the current capital projects that are being supported (Memorial Stadium, Comcast Arena, and Lynnwood Convention Center), Comcast Arena and Lynnwood Convention Center were chosen through a competitive application process in the early 2000s. The projects did not compete against each other, as money was designated separately for each of the geographic areas. For that competitive process, Snohomish County put together a Large Fund Program Guidelines and Application document that laid out the purpose of the fund, minimum eligibility criteria, and selection criteria.

Minimum eligibility criteria included:

- Projects must be consistent with RCW and the County's allocation strategy.
- The applicant and partners must make a substantial financial commitment to the proposed project.
- County funds will ordinarily not amount to any more than 30% of the total project cost, including debt service.
- Projects must demonstrate adequate feasibility through market and financial analyses.
- Projects demonstrate the capacity to be under construction within 24 months of approval.
- Project applicants must demonstrate they have control of the sites of their projects.
- County funds will be used for construction and "due diligence" project development costs, not operation and maintenance.

If a project met all of the above eligibility requirements, it was then scored according to the selection criteria, as shown in Exhibit 5 on the following page. Qualifying applications were reviewed by a technical review panel that made funding recommendations to the LTAC. The LTAC then prepared their own comments on the proposals, before forwarding the recommendations to the County Council for final decision on project approvals and funding levels.

Exhibit 5

Scoring Criteria Used in the Early 2000s to Select Large Fund Capital Projects

Criteria	Points
Business Plan Viability. The business plan was evaluated on the significance of its target market, the methodology for identifying the target market, how the project addresses the identified market, plans for marketing the completed project, short- and long-term financing, and strategies for evaluating project success.	10
Long-term Vision of Strategic Investment. The project was evaluated on whether it had a long-term vision of strategic investment that aligned with the Snohomish County Strategic Plan for Tourism Development and Promotion.	6
Quality of Life. The project was evaluated on how it would positively affect quality of life in the community, and how the applicant proposed measuring this success once the project was operable.	3
New Tourism Activity. The project was evaluated on the methodology used to establish estimated bed nights generated, and the scheme for tracking results.	10
Organizational Capacity. The applicant was evaluated on whether they had the organizational capacity to complete the project, what similar projects they had completed successfully, and if the applicant and its partners had the requisite skills and experience.	10
Community Tie-In. The project was evaluated on how well it fit into local community planning and the public planning process, and what the level of community support was.	6
Operational and Maintenance Capacity. The project was evaluated on whether the applicant demonstrated the financial and resource capacity to operate and maintain the facility once constructed.	7
Market Viability. The project was evaluated on whether the market the project proposed to serve truly exists, and that the market was of significant magnitude to generate adequate visitor bed nights.	10
Funding Plan. The project was evaluated on how the applicant planned to finance the full capital cost of the project, including plans for fundraising, capital campaigns, and evidence of committed funding.	7
Economic Benefit. The project was evaluated on its economic benefit from the public investment in the project, both direct and indirect.	7
Leverage of County Funds. The project was evaluated on how highly the County's funding would be leveraged by other funding sources.	6
Partnership/Collaboration. If the proposed project was collaborative between two or more agencies, the applicant had to submit information about the partnership and the different partners' commitments.	6
Facility Versatility. The project was evaluated on how versatile the facility would be, and how accessible it would be to uses beyond its primary purpose.	3
Off-Season Tourism Promotion. The project was evaluated on whether it would promote tourism development during the off-season.	3
Community Lodging Tax Support. If the project originated from a community that levies its own lodging tax, the applicant had to explain the degree of support coming from that fund.	6
Total	100

The Opportunity Fund

In addition to the regular distributions and grant cycles of the Large and Small Funds, the County offers funding through the Opportunity Fund. This money, either from the Large or Small Fund, is made available outside of the regular grant cycle to take advantage of extraordinary tourism promotion opportunities that don't align with normal application periods.

Requirements to access the fund are more rigorous than the other grant cycles, preventing the Opportunity Fund from becoming a way for organizations to circumvent the normal application process.

2. TOURISM PROMOTION AREA

A Tourism Promotion Area (TPA) is an established geographic boundary, within which lodging establishments can choose to assess, as a group, an additional fee on each room-night of lodging they sell. TPA assessment revenues can be used to fund tourism promotion and development activities.

Snohomish County has not yet established a TPA. The lodging business community proposed the details of the TPA in an Initiation Petition presented to the County Council. This petition was signed by the operators in the proposed area that would pay 60% or more of the proposed charges, as required by law. The County Council has passed a resolution stating their intent to support the effort.

The proposed TPA has the following details:

- The TPA would encompass the Cities of Arlington, Bothell, Everett, Edmonds, Lynnwood, Marysville, Monroe, Mountlake Terrace, and Mukilteo as well as unincorporated areas of Snohomish County. The proposed Cities would be joining the TPA through an inter-local agreement.
- The assessment imposed on the operators of lodging businesses in those areas is proposed at \$1.00 per room-night (only half of the legal maximum of \$2.00 per room-night as stated in RCW 35.101.050). The lodging community estimates in the petition that this will result in annual revenues between \$700,000 and \$1 million.
- The assessment would only be imposed on operators of lodging businesses with properties having 50 or more rooms.

All future lodging establishments in the area that fit the criteria must also participate in the TPA. Tulalip tribes and any lodging establishments located on the Tulalip reservation are not required to participate.

Source of Funds

TPA revenues come from a dollar amount assessment on each room-night of lodging purchased in a defined geographic area. This would add a set amount to each night of lodging purchased by a customer, and this amount would accrue to the TPA fund.

Fund Administration

All TPA revenues would be deposited into a dedicated fund, used only to support tourism. RCW 35.101.030 gives the County Council sole discretion about how to use the money to promote tourism, and also gives the Council authority to create an advisory board for the purpose of fund distribution.

For the proposed Snohomish County TPA, the lodging industry would select a Board that would make funding recommendations to the Council. The lodging industry will devise the election/appointment process, as well as the composition and bylaws for the Board. General guidelines from the Snohomish County Lodging Association

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Executive Board are that the Board should represent all areas and lodging types, and that members be nominated by the lodging community.

This lodging community will also have the discretion to halt the assessment through a vote, if the industry isn't satisfied with how the account is being administered.

Allowed Uses of TPA Funds

Use of these funds is regulated by RCW 35.101, which authorizes the establishment of a TPA and permits the levy of special assessments to fund tourism promotion. The RCW defines eligible tourism promotion costs as: "activities and expenditures designed to increase tourism and convention business, including but not limited to advertising, publicizing, or otherwise distributing information for the purpose of attracting and welcoming tourists, and operating tourism destination marketing organizations."

Use of these funds will also eventually be regulated by the statutes passed by the Snohomish County Council.

Proposed Use of TPA Funds in Snohomish County

The proposed TPA states that revenues will be used for the following purposes:

- The general promotion of tourism within Snohomish County as specified in the TPA business plan to be adopted annually.
- The marketing of convention and trade shows that benefit local tourism and the lodging business in the TPA.
- The marketing of Snohomish County in the travel industry in order to benefit local tourism and the lodging businesses in the TPA.
- The marketing of Snohomish County to recruit sporting events in order to benefit local tourism and the lodging businesses in the TPA.

Under these criteria, the Snohomish County Sports Commission, the Snohomish County Tourism Bureau, and arts, culture, festivals, and sports organizations that bring an actual return on investment in overnight hotel stays as a result of their marketing efforts would be eligible to compete for the funds.

Proposed Award Process and Criteria

TPA assessment funds would be accessed by eligible organizations through an application process. The TPA Board appointed by the County to distribute these funds would create an application process and establish requirements and criteria for applicants. The TPA Board would review applications and make recommendations to the Council for funding.

The Snohomish County Tourism Bureau and the Snohomish County Sports Commission would have to adhere to the same rules as other applications for the funds, and would have to submit applications with detailed uses of the requested funds before receiving any grants.

3 . HOTEL/MOTEL TAX REVENUE FORECASTS

Exhibit 6 estimates Snohomish County's future small and large fund revenues from 2010-2015. Actual revenues from 2009 are included for comparison. The amounts in the table are total revenues, including both tax and interest revenues.

Methodology

For each fund, there are high and low estimates that together compose a probable range in which Snohomish County's actual revenues over this time period will land.

- The high estimate was calculated using Snohomish County's actual growth in each revenue stream from 1999-2008, giving an optimistic view of potential revenues. The time period leading up to 2008 experienced very high growth, and it is unlikely that any future growth will outpace this period, making it very likely that future revenues will be less than this optimistic estimate.
- The low estimate was calculated using the Washington State Economic and Forecast Council's short-term projections for the implicit price deflator from the September 2010 forecasts. This is a conservative estimate that ties the lodging fund revenues to projected overall growth of the whole economy.

Revenues are expressed in year-of-expenditure dollars and are not adjusted for inflation.

Exhibit 6
Hotel/Motel Tax Revenue Forecasts (2010-2015)

	2009	2010	2011	2012	2013	2014	2015
Small Fund							
High Estimate	\$336,866	\$349,300	\$362,300	\$375,700	\$389,600	\$404,000	\$418,900
Low Estimate	\$336,866	\$344,600	\$352,500	\$360,600	\$368,900	\$377,400	\$386,100
Large Fund							
High Estimate	\$1,557,978	\$1,677,900	\$1,807,100	\$1,946,300	\$2,096,200	\$2,257,600	\$2,431,400
Low Estimate	\$1,557,978	\$1,593,800	\$1,630,500	\$1,668,000	\$1,706,300	\$1,745,600	\$1,785,700

- Small Fund Revenues
 - On the high end, small fund revenues are estimated to grow at approximately 3.7% annually, as they did from 1999-2008. This would result in 2015 revenues of approximately \$418,900.
 - On the low end, small fund revenues are estimated to grow at approximately 2.3% annually. This would result in 2015 revenues of approximately \$386,100.
- Large Fund Revenues
 - On the high end, large fund revenues are estimated to grow at approximately 7.7% annually, as they did from 1999-2008. This would result in 2015 revenues of approximately \$2.4 million.
 - On the low end, large fund revenues are estimated to grow at approximately 2.3% annually. This would result in 2015 revenues of approximately \$1.8 million.

Appendix E: Asset Inventory Overview

OVERVIEW

The Snohomish County Tourism Plan will include a Master Asset Report, which will contain information about both known assets and hidden assets. A growing trend in community planning for tourism and economic stimulus is a Hidden Asset Inventory.

More and more tourism experts around the United States and in Europe are researching, and subsequently, developing hidden asset strategies for both urban and rural areas. The global trend towards tourists who are looking for “authentic” experiences supports the need for hidden asset inventories. These inventories support authentic tourism by revealing what might traditionally have gone unnoticed.

A hidden asset inventory has many benefits: it provides a traveler with a greater regional and cultural understanding; creates a mechanism for customized experiences; it provides a stronger market for locally produced food and products; it puts travelers in personal contact with local residents; and, it supports a local sustainable economy. Further, an inclusive and thorough inventory of assets encourages cross sector collaboration in tourism, bridging the gap between major attractions and amenities found off the beaten path.

But, hidden assets are just part of the package of the full asset inventory for the County. Snohomish County offers a tremendous variety of amenities through its vast wealth of urban areas coupled with small towns and remarkable natural resources from its marine shoreline to its lush mountainous region. Given this diversity, the goal of the asset review for the Snohomish County Tourism Plan was to identify as many of the tourist assets as possible - including hidden assets – that generate an authentic tourism experience while bringing an equitable understanding of potential in all corners of the County.

ASSETS REVIEW

Master Asset Categorization

The Master Asset Inventory document will include a full listing of all the assets in the County from aviation to artists. From the start of this project, each asset defined by stakeholders has been documented for inclusion in the final Snohomish County Tourism Plan.

Hidden Asset Inventory

The hidden assets primarily fall into these categories:

- Arts/Culture/Heritage
- Aviation
- Culinary/Farms/Food
- Indoor events
- Outdoor events
- Outdoor Recreation

Tourism Exploration Zones

In order to make organization of the assets easier and more marketable, the assets are defined by zones, which are referred to as Tourism Exploration Zones or TEZ in the Plan. The TEZ zones include:

- North (Arlington, Darrington, Granite Falls, Stanwood)
- South (Bothell, Edmonds, Maltby, Mountlake Terrace)
- East (Gold Bar, Index, Lake Stevens, Monroe, Snohomish, Sultan)
- Central (Everett, Lynnwood, Mukilteo, Marysville, Mill Creek, Tulalip)

Asset Identification

The master asset inventory for Snohomish County Tourism is an outgrowth of the comprehensive stakeholder plan developed by the team and the County. The overarching approach emphasizes close-touch and active listening as well as the importance of identifying resources in the community emblematic of the richness, depth and breadth of assets distributed across Snohomish County. It also addresses the need of providing multiple tools and venues to collect data and uses a qualitative tool called “snowball sampling.”

Through this methodology, assets are identified and organized by sectors. The identification and organization is done through a variety of mechanisms, such as Snohomish County and Snohomish County Tourism Bureau databases, group workshops, one-on-one interviews, the anonymous online survey and snowball sampling.

Snowball sampling is a qualitative research method used when a desired sample characteristic is rare or not visible. It may be extremely difficult or cost prohibitive to locate respondents in these situations. Snowball sampling relies on referrals from initial subjects to generate additional subjects. While this technique can dramatically lower search costs, it comes at the expense of introducing bias because the technique itself reduces the likelihood that the sample will represent a good cross section from the population. The balance to this potential bias is the identification of assets not yet known but seen as contributory to a diverse and vibrant tourism destination.

RESULTS FOR PLAN

One of the primary results of the asset inventory process – and primarily the search for hidden assets - was the good will garnered by the County. This process demonstrated proactive unbiased inclusion of a broader range of stakeholders and reiterated the County’s willingness to hear its constituency post the results of the last workshops held in 2009. The process also encouraged a greater number of partnerships and collaboration with new stakeholder groups such as tribal communities and the Cascade Land Conservancy, to name a few.

The inventory is now an easily accessible tool to create a more advanced list of County offerings. The inventory creates regional equity in the County by placing greater emphasis on attractions in rural areas to the North end of the County and to the East side of I-5 where there is less critical mass and less funding mechanisms for tourism at a small town level. By identifying the hidden assets and by the mechanism in which they were found the entire process will help the County integrate community level activity with classical tourism attractions.

Appendix F: Hidden Assets Inventory, Gaps, Opportunities and Trends

OVERVIEW

A growing trend in community planning for tourism and economic stimulus is a Hidden Asset Inventory (otherwise known as Innovative Assets). More and more tourism experts around the country and in Europe are researching this potential and developing hidden asset strategy for both urban and rural areas. The need for hidden asset inventories is supported by the global trend towards tourists who are looking for “authentic” experiences.

Hidden asset inventories support authentic tourism by revealing what might traditionally have gone unnoticed in more conventional means of cataloging tourism opportunities. The hidden asset inventory:

- Provides a traveler with greater regional and cultural understanding
- Creates a mechanism for customized experiences
- Provides a stronger market for locally produced food and products
- Puts travelers in personal contact with local residents
- Supports a local sustainable economy

Furthermore, an inclusive and thorough inventory of assets also encourages cross sector collaboration in tourism, bridging the gap between major attractions and amenities that are found off the beaten path.

Snohomish County offers a tremendous variety of amenities through its vast wealth of urban areas coupled with small towns and remarkable natural resources from its marine shoreline to its lush mountainous region. Given this diversity, the Frause team, including Calyx Sustainable Tourism, Site Story and BERK & Associates, set about to identify the hidden assets of Snohomish County that lend themselves to an authentic tourism experience and will also bring an equitable understanding of potential in all corners of the county.

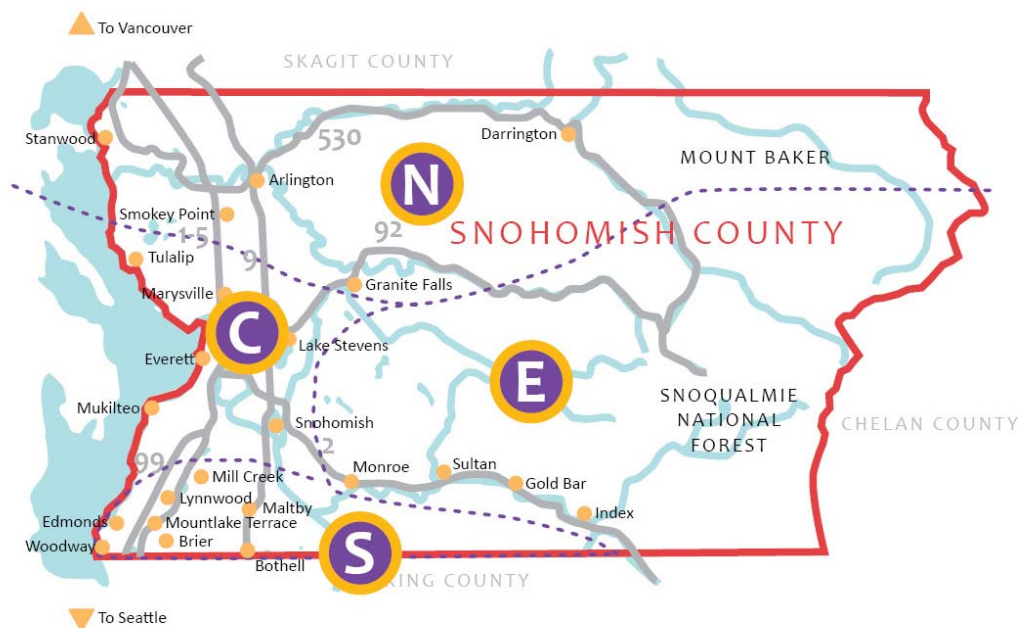
The hidden asset inventory was organized categorically by the following:

- Arts/Culture/Heritage
- Aviation
- Culinary/Farms/Food
- Indoor and Outdoor Events
- Outdoor Recreation

Based on the geography of the county we systemized the assets by zones, referred to as Tourism Exploration Zones or TEZ. The TEZ zones include:

- **North:** Arlington, Darrington, Granite Falls Stanwood
- **Central:** Everett, Mukilteo, Lake Stevens, Snohomish, Marysville Tulalip
- **East:** Monroe, Gold Bar, Sultan Index
- **South:** Bothell, Mill Creek, Lynnwood, Mountlake Terrace, Edmonds (Brier, Woodway)

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TOURISM EXPLORATION ZONES

- N North** | Arlington, Darrington, Granite Falls, Stanwood
- C Central** | Everett, Mukilteo, Lake Stevens, Snohomish, Marysville, Tulalip
- E East** | Monroe, Gold Bar, Sultan, Index
- S South** | Bothell, Mill Creek, Lynnwood, Mountlake Terrace, Edmonds, (Brier, Woodway)

METHODOLOGY

The master asset inventory for Snohomish County Tourism is an outgrowth of the comprehensive stakeholder plan developed by the team and the County. The overarching approach emphasizes close-touch and active listening as well as the importance of identifying resources in the community emblematic of the richness, depth and breadth of assets distributed across Snohomish County. It also addresses the need for providing multiple tools and venues to collect data and uses a qualitative tool called “snowball sampling.”

Using this methodology, assets were identified and organized across the sectors of Arts/Culture/Heritage, Aviation, Culinary/Farms/Food, Indoor and Outdoor Events and Outdoor Recreation through a variety of mechanisms: Snohomish County and Snohomish County Tourism Bureau databases, group workshops, one-on-one interviews, on-line survey instrument and snowball sampling.

Snowball sampling is a qualitative research method used when a desired sample characteristic is rare or not visible. It may be extremely difficult or cost prohibitive to locate respondents in these situations. Snowball sampling relies on referrals from initial subjects to generate additional subjects. While this technique can dramatically lower search costs, it comes at the expense of introducing bias because the technique itself reduces the likelihood that the sample will represent a good cross section from the population. The balance to this potential bias is the identification of assets not yet known but seen as contributory to a diverse and vibrant tourism destination.

RESULTS

One of the primary results of the Hidden Asset Inventory was the goodwill factor by the County. This process demonstrated proactive unbiased inclusion of a broader range of stakeholders and re-established the County's willingness to hear its constituency subsequent to the outcomes of the workshops held in 2009. The process also encouraged a greater number of partnerships and collaboration with new stakeholder groups such as tribal communities, Cascade Land Conservancy etc. to name a few.

The Hidden Asset Inventory can be used as a mechanism to bolster the tourism bureau web site content. This inventory is now an easily accessible tool to create a more advanced list of County offerings. The inventory creates regional equity in the County by placing greater emphasis on attractions in rural areas to the North end of the County and to the East side of Interstate 5 where there are less critical mass and funding mechanisms for tourism at a small town level.

By identifying the hidden assets and by the mechanism in which they were found the entire process will help the County integrate community level activity with classical tourism attractions.

HIDDEN ASSETS

Hidden assets are those physical, location-based or experiential assets (e.g., classes, tours, participatory experiences) that are explored in the context of classic tourism inventory and marketing efforts. Snohomish County has a rich, diverse and interesting suite of assets that range from the shorelines of Puget Sound, its rivers and estuaries, to its small towns, larger metropolitan areas, farmlands, and extending to a wide swath of jewel-toned forest canopies.

A hidden asset inventory is a valuable companion piece to a classic asset inventory in that it provides greater depth, can reveal assets that will develop new markets, and can help to integrate the host community and tourism organizations more seamlessly.

Arts/Culture/Heritage

Arts/Culture/Heritage assets are categorized as follows:

- Art Galleries
- Arts Festivals
- Performing Arts and Community Theater
- Concerts and musical events
- Historic Architecture including landmark buildings and barns
- Historic Sites
- Public Art
- Tribal properties and attractions of the Salish People
- Assets that distinguish the uniqueness of Snohomish County

Arts

The County is abundant with wonderful arts experiences and attractions including visual arts, community theater, performing arts and music. There are ample facilities that host these events and make Snohomish County a vital

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arts community. The art gallery inventory is substantial in promoting local artists as well as regional artists who have a strong following. Parks, Plazas, train stations, streetscapes and other municipal facilities showcase art readily. The City of Edmonds in particular is a great example of where the arts investment has paid off for the city's economic development. Edmonds is the best example of a community that provides easy arts access through its walk ability to galleries, theaters, performing arts venues, festivals and the local business community.

In considering the arts, we invited a large number of stakeholders to contribute ideas and concerns through one-on-one interviews as well as an Arts, Heritage and Cultural resources workshop.

Culture/Heritage

The National Trust defines cultural heritage tourism as “traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past and present. It includes cultural, historic and natural resources.” Studies by the National Trust and other cultural heritage organizations have reliably revealed that cultural heritage travelers are more inclined to plan overnight visits and often spend more money than other types of travelers.

More marketing-ready products for travelers have been the emphasis on past tourism strategies and investment. Today, cultural and heritage tourism is becoming more prevalent, supported more readily by state and county agencies, and is more likely to overlap with market-ready tourism. States that have seen the most measurable success include Indiana, Tennessee, Texas and Wisconsin.

Natural resources play a big role in influencing the heritage and culture of an area. With exciting natural resources in close proximity throughout Snohomish County, these resources can be maximized to attract visitors to cultural and heritage sites as well. Assessing resources is the first step. Evaluation of natural resources coupled with attractions, services, protection, branding and organizational capacity will help to form a cultural heritage plan. The Washington Information System for Architectural and Archaeological Records Data (WISAARD), has identified that Snohomish County has 1500 cultural heritage sites, although many are not accessible to the general public, a substantial number are already in use or could be considered for tourism bundling.

Aviation

The Aviation division includes a small group of facilities and services that provide education opportunities to learn about flying, airplane manufacturing and aviation history. They include:

- Aviation Centers & Airplane Manufacturing
- Aviation Collections
- Events
- Adventure Services

Per our discussion in the strategy section of the Snohomish County Tourism Plan, aviation attractions are some of the most celebrated facilities in the County. Although the least in terms of the number of attraction offerings,

these attractions were most substantially acknowledged by survey participants as a key factor in the identity of tourism in the county. Based on our survey for the Tourism Plan, the Boeing Tours received 49% as the top ranking tourism facility in the county followed by the Future of Flight at 29%. The Boeing Tour and Future of Flight Aviation Center are considered the heart of aviation tourism. Arlington's Fly-in event is noted as one of the most successful Fly-Ins in the country.

In terms of flying adventures, lessons, skydiving and balloon rides, our survey results demonstrate a reasonable offering of these aviation types of activities.

Culinary/Farms/Food

This sector includes a wide diversity of farms with corresponding agritourism activities, a burgeoning number of farmer's markets and more casual, popular small restaurants. These assets are categorized as follows:

- Culinary Schools
- Farms (U-pick, farm tours, classes, events)
- Farmer's Markets (Edmonds, Everett, Lake Stevens, Mukilteo)
- Specialty Food Stores
- Restaurants
- Wineries, Wine Tasting Rooms, Breweries and Distilleries

The research team and Snohomish County conducted an on-line survey of opinions of existing tourism assets and gaps. Of the final list of tourism categories provided, 58% of the respondents rated the County's agricultural offerings as appealing or very appealing.

Snohomish County has 1,574 farms of which the largest percentage is between 10 and 49 acres (U.S. Agriculture Census). Many of the hidden assets added in the farm category include those farms providing both viable habitat for salmon through Stewardship Partner's [Salmon Safe](#)® Program as well as offering tours, classes, U pick operations or entertainment.

The county boasts a surprising number of cooking schools (seven), primarily concentrated in the southern part of the county. Options range from grocer-oriented sites (SnoIsle Food Coop or PCC), to cooking schools where classes can be taken singly or as an iterative course. One school in particular offers classes to help develop culinary skills in children.

There are several smaller restaurants that offer highly rated ethnic food, in some cases live music and dancing (Bobby's Hawaiian Style Restaurant), Dancing (Marimba) or serve classic Americana cuisine. In the last five years, there has also been a noticeable increase in wineries, distilleries and breweries, all hosting tastings and other offering classes and dinners. There are nine such businesses scattered from tasting rooms to U-brew establishments and farm-based distilleries.

Outdoor Events

Snohomish County offers a range of community based outdoor events:

- Broad purpose festivals: community celebrations
- Music festivals
- Specialty festivals: agriculture, food and wine, fishing, horse-centered
- Sporting events: competitive events
- Sustainability Tours

Festivals offer a way to generate revenue for smaller locally owned businesses, highlight local products, introduce unknown local assets unfamiliar to the visitor and provide a link to niche tourism development. For those interested in natural landscaping, co-housing, energy and other aspects of sustainable living, there are also several sustainability tours of interest. South and Central County zones offer the largest number of events, such as the Taste of Edmonds or the Port of Everett's Annual Salmon Derby. In more rural areas to the east, Darrington hosts

and boasts a number of high-volume, high-profile music and sporting events; including the Sauk Suiattle PowWow and every four years the National Archery Championships. The City of Arlington is known for its annual Fly In, rated one of the most successful by the US Pilot's Association and the WA Pilot's Association.

Outdoor Recreation

Snohomish County is known for its outdoor life. The lure of water, fish, hiking trails and sporting events has beckoned visitors for decades and the county is well known for its climbing (Index), fishing, hiking, and kite boarding. The Tribes, the Washington State Department of Natural Resources, the U.S. Forest Service and the military own a sizable portion of land spanning Puget Sound to the high Cascade crest to the north and east of the County. Additional protected land was added to Snohomish County and King County due to passage of the Wild Sky Wilderness Act. These spectacular lands provide wildlife habitat and recreation lands to the north and east of Index and Gold Bar (<http://thomas.loc.gov>. Look for H.R. 886).

Outdoor recreation assets are categorized as follows:

- Equestrian
- Climbing
- Fishing
- Hiking, Backpacking
- Kite boarding
- River based (kayaking, fishing, rafting)
- Walking
- Wilderness Training

The county has a sizeable inventory of trails, including more urbanized multi-use trails such as the Centennial Trail and Interurban Trail, dotted with places to rest, eat or shop. There are a range of horse camps and equestrian activities and a Monroe business that specializes in a particular breed of sled dogs. The Snohomish Public Utility District offers some interesting summer tours of its hydroelectric facility near Spada Lake and there are countless opportunities to fly-fish, take classes, and compete in fishing derbies.

Alderleaf Wilderness College provides a template to develop appropriate wilderness skills to support the range of outdoor recreation in Snohomish County. The team found a number of Meet Up® groups that focus on hiking and walking and we find, as a general rule, local residents are the best tourism ambassadors.

TOURISM GAPS

Tourism gaps were identified through on-line surveys, workshops, one-on-one interviews, and drop-in days. The following gaps were identified through the survey instruments referenced above as well as our own analysis:

- Product Development Gaps
- Trails and Itineraries
- Infrastructure: Transportation and Wayfinding (signs), lodging
- Fiscal and Management Issues: collaboration, communication and marketing
- Technology

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In this section we will primarily address the gaps in tourism products, meaning tangible experiences or consumptive products. Each gap category is then followed by niche market and underdeveloped opportunities section.

Product Development Gaps

Arts

Gaps

- Youth Engagement in Arts Activities
- Gallery Tours in North and East zones of rural County communities
- Exhibition of art by indigenous cultures
- Outlets for tribal musicians and their drumming circles
- Mainstream concert events

Niche Markets and Underdeveloped Opportunities

Recommendations

- Develop Youth Art Exhibition: work with arts organizations and Snohomish Council for the Arts to create youth events that can tour and be held in various locations throughout the county. Encourage participation by public and private sector schools.
- Promote Tribal Arts: develop events and exhibitions specific to tribal artists, wood carvers and throughout the County to help bridge the northern and rural arts potential in the County where there is less critical mass of galleries and events.
- Create a Concert Promotions Task Force: feedback at a survey level and the in-person interview process revealed that the County is missing out on mainstream music acts that normally go to Seattle and Tacoma. By creating a task force of promoters Snohomish County could potentially bring bigger names to the area and demonstrate the value of its venues to decision makers in the music industry.

Strategic Considerations

- List Pow Wows on the County Web Site: most events of a tribe's annual Pow Wow are open to the public. By providing information about these events the County Tourism Bureau can help provide a more extensive offering of indigenous experiences that provide cultural understanding with indigenous peoples as well as elevating the relevancy of the tribes in Snohomish County.

Culture/Heritage

Gaps

- Tours of Timber Dependent Communities
- Exhibits and storytelling around the original Snohomish County industrial revolution of timber harvesting and wood manufacturing.
- Use of Sasquatch in Folklore
- Snohomish County History Museum
- Historic Barn Tours

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- Access to indigenous art and music (see comments above)
- Interpretive Education experiences

Niche Markets and Underdeveloped Opportunities

Strategic Considerations

- Encourage exhibitions and storytelling events that focus on lumber: From the mid 1800's to the turn of the century, lumber and Shingle Mills were the key industries of the County. To the east, timber harvesting was the main occupation outside of farming; to the west lumber and shingle mills lined the coastal communities of Edmonds & Everett.
- Utilize the mystique of Sasquatch: Building off the lush wooded landscape of forested areas of Snohomish County, build up the folklore of Sasquatch as a unique part of the County's history. Great examples of similar folklore include the Jersey Devil of the New Jersey Pine Barrens and Paul Bunyan of Maine. Sasquatch could also make a wonderful graphic icon figure for County promotions.
- Promote History: Encourage more historical tours of county assets including barns, landmark structures and historical sites. The League of Snohomish County Heritage Organizations is a terrific partner for this effort.
- Help strengthen the formation of the Snohomish County Museum: The collection of the Snohomish County Museum is impressive and diverse in its subject matter. Until a permanent home is found for the institution, its collection could be on loan to other visitor amenities, a traveling exhibit could be established or a virtual tour created to expose these treasures to the tourists and community members at large.
- Identify interpretive education opportunities: the value of interpretive education through exhibits and way finding is to provide an informative process as a visitor moves through a landscape, a museum, historic site, parks, nature centers etc. By digging deeper into the County's hidden assets there is an opportunity to tell the story of Snohomish County through interpretation. Providing little known facts and tidbits of history will add to the ephemeral sense of place and the unique characteristics that contribute to an authentic tourism experience of the County.

Aviation

Gaps

- Aviation Innovation Center

Niche Markets and Underdeveloped Opportunities

There are not a lot of gaps in aviation's role in the County's tourism potential. It is a highly specialized and area of tourism travel within an extremely competitive sector of museum and exhibition funding.

Strategic Considerations

- Help redefine the Future of Flight as an Innovation Center: Although the Boeing Tour and Future of Flight are well known, their attendance is not substantial enough to attract overnight stays. It competes with the Museums of Flight which is within an hour's drive of its location.
- The Future of Flight struggles to fund new exhibits. It is not recognized for its "freshness and relevancy" in current trends of aviation and aviation innovation.
- Partner more frequently on shared promotions: Our survey data shows that the Flying Heritage Collection and Historic Flight Foundation remain relatively unknown compared to the Boeing Tour and Future of Flight, yet

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locally are well respected by tourism stakeholders. A more aggressive marketing campaign around the variety and close proximity of the aviation attractions would help create synergy for their success.

- At a visitor level modernize the image of Boeing's role in technology: Encourage the Future of Flight to create messaging around Boeing's role in space travel and its contributions to space exploration as part of its legacy.

Culinary/Farms/Food

Gaps

- Higher quality, locally-owned restaurants
- More interpretive, educational and hands-on farm-based experiences, such as growing lessons, integrated pest management, ethnic foods garden development, caring for city chickens, farm stays and cooking lessons (including cheesemaking, cutting meats, farm-to-table)
- Absence of culinary tours and trails, including roadside crop signs
- Lack of specialty food stores
- Itineraries that link the farm or river with the kitchen
- Itineraries that link farmer's markets with culinary schools and local edible garden tours
- No permanent, year round farmer's market (do they need one?? Edmonds and Everett appear to be successful on their own. Should it be town-by-town or County wide?)

Niche Markets and Underdeveloped Opportunities

Washington State is only second to California in crop diversity and enjoys a dizzying array of crops (see "Community Vision for Sustainable Agriculture in Snohomish County"). Snohomish County should capitalize on the state's bounty by branding its crops and then linking those farms crops to a suite of culinary tours and events, classes and passive outdoor recreation for post cooking and dining. Niche markets and underdeveloped opportunities include:

Recommendations

- Seafood and River Fish Culinary Schools: Culinary Schools that specialize in seafood and river and lake fish: Most of the existing culinary schools are located in south Snohomish County and there is none which specialize in seafood or linking local fishing with cooking
- Agriculinary Itineraries: Culinary Tours that trace on-farm visits and learning with shopping tours at farmer's markets, fishing lessons, edible garden development and cooking classes
- Value-added artisan shops: Specialty, valued-added food stores and classes: there appears to be an absence of value-added food stores outside of a few high-quality butchers and cheese shops or farm stands. These value-added food stores can be linked with development of a localized brand name (Sky Valley smoked trout for instance) to help brand the product
- Cross Market Snohomish Brand CSA: Cross-market Community Supported Agriculture (CSA) that brand Snohomish meats, fish, crops and libations for baskets for in Snohomish County and regionally
- Outdoor Cooking Schools: Outdoor cooking schools and BBQ schools in the eastern part of the County, including classes for backpackers and long distance kayakers (food dehydration classes)

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- Learning-based Agritourism: Enhanced farm visits that include classes, demonstration hands-on garden plots, environmental management tools for gardeners, city chicken care, butchering small animals, cheese making, animal care and on-farm inns
- Ranch Stays and Western Cooking: Pair existing equestrian ranch stays with focus on western cooking and outdoor fire cooking
- Libation and Food Pairings: Wine, brewery and distillery and food pairing classes
- Restaurant Development: As part of an overall economic development strategy, work with local microenterprise organizations or joint ventures to develop new restaurants that feature Snohomish County agricultural and seafood products.

Outdoor and Indoor Events

Gaps

- Mainstream music/concerts
- Inadequate facilities at field-based concert venues
- Large Water Park
- Comprehensive Walking Maps
- Revitalized Everett Waterfront
- Indoor Soccer Field
- Infrastructure, including lodging for training athletes, for major sports tournaments
- Festivals that cross-market different themes (e.g., food with aviation, fishing with the arts)

Niche Markets and Underdeveloped Opportunities.

Recommendations

- Sport Map: Develop a sport map which will identify all the locations across Snohomish County that offer fields, indoor facilities, physical therapy, equipment and nearby tourism assets
- Cross Market Festivals: Festivals should be mapped and categorized and the County should work with partners to develop cross-market collateral and web sites to encourage festival attendees to consider festivals from other Snohomish County areas they have not visited
- Local Music Incubator: Inventory local musicians from Snohomish, Island, King and Skagit counties that can be featured in Snohomish County as part of a local brand to help incubate local musical talent.

Strategic Considerations

- Sports-in-One: Develop integrated sports Itineraries that will link visiting athletes with other sporting events and opportunities, as well as outdoor recreation and local food
- New Everett: Develop a food, wine, arts and maritime theme for Everett's gateway, working with Military families on strategies. Ensure Everett's gateway is beautiful, colorful and makes clear links with the water
- Walking Snohomish: Partner with walking clubs, public health and affiliated nonprofit organizations to develop walking maps for all towns and cities. Include public transportation routes, bicycle routes, skate parks and water trails (www.wwta.org)

Outdoor Recreation

Gaps

- Lack of a water sports center that features kayaking, canoeing, kite boarding, jet skiing
- No whitewater or kayak parks
- Outdoor recreation events restricted to fishing derbies, river celebrations and paddling events
- Lack of coordinated planning with other major travel routes such as SR 20 and SR 530
- Absence of outdoor and natural interpretive tours: photography, geology, storytelling, naturalist, wilderness training tours, painting, yoga
- Outside river rafting, there are very few kayak centers and guides for both sea and whitewater kayaking
- Very little infrastructure to help promote wildlife viewing in Snohomish County (outside Bird Fest and Port Susan Bay, or the Snohomish River Estuary); and associated lack of planning between wildlife agencies, non-profits, Snohomish County Parks and private sector companies to facilitate organized wildlife-related tourism
- Lack of publicly accessible shoreline along the Puget Sound where primary land is either privatized or in the case of the City of Everett managed by the Port affording limited access to coastal marine trails and waterfront parks.
- Limited Off Road Vehicle (ORV) trails
- Limited river access for fishing
- No BMX bike trails

Niche Markets and Underdeveloped Opportunities

Recommendations

- **Snohomish Water Itineraries:** Develop geographically based water trails from Puget Sound and its estuaries to lakes and rivers. Include clustered links for equipment, tide tables, fishing reports, places to eat and stay overnight, camp grounds and MeetUp® groups that may be available. Work with the Washington Water Trails Association to help identify camp grounds for sea kayakers
- **Wildlife Viewing Packages:** Coordinate wildlife viewing areas encompassed by the Snohomish River Estuary, Edmonds Marsh, Port Susan Bay and other areas identified on the Cascade Loop Birding Trail (Audubon Washington) with equipment providers, naturalist guides, smaller bus companies and food/farming assets to create a full set of wildlife viewing experiences.
- **Celebrate Water Centers:** Work with private sector companies to develop several “Celebrate Water Centers” (coastal and eastern Snohomish County) to site in a festive, physical center, equipment rentals, skills training, maps, environmental stewardship and food/lodging opportunities for the wide range of water-based recreation: canoeing, fishing, kayaking, kite boarding, jet skiing, and sailing.
- **BMX Trails along Route 530 to Darrington:** Work with the railroads to develop related bike trails along SR 530 and upland BMX trails near Darrington.
- **Use Policy Forum:** Work with user groups, the Washington State Department of Natural Resources, conflict resolution experts and biologists to discuss and resolve user conflict and access issues around ORV trails, potential BMX biking, hunting and associated issues of salmon and trout health, watershed vitality, hiker

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safety and the cost of river cleanups. This will help to identify and inventory ORV and river access points while providing better contextual information for all types of land users.

- Sky Valley Anew: Work with Monroe to create a gateway to Sky Valley that is more emblematic of its farm and nature-based roots by using signage, plants and flowers to offset its current commercial look and feel. Use the same approach for Sultan, particularly around the Sky Valley Chamber of Commerce. Create a Sky Valley I-phone app that provides rivers, hiking trails, food and outdoor links to help enhance access to these sites. Work with microenterprise organizations regionally to help develop fishing, hiking, hunting and wildlife viewing equipment suppliers in the Valley.

Trail and Itinerary Gaps

Some of the respondents and the team noticed gaps in itineraries that can be grouped by geography or interest. Itineraries make travel easier, particularly for people using on-line resources to do travel planning.

Underdeveloped Opportunities

Recommendations

- Work with community groups, affinity groups and other stakeholders to develop geographic, time- and interest-based itineraries for 3 hours, ½ day, full day and two-day stays. Pay particular attention to small towns that have been historically under-represented in tourism marketing such as Sky Valley, Mountain Loop Highway towns and western Snohomish County farm country.
- Ensure these itineraries are available at VICs, on Snohomish County and STB web sites and in convenient and attractive print collateral form at major attractions (ferries, aviation asset sites, big draw restaurants such as Anthony's and Forest Service Visitor Centers)

Strategic Considerations

- Enable technology that allows travelers to create personalized itineraries on the Tourism Bureau website and to print out or download to a Smartphone

Infrastructure Gaps

A significant tourism gap mentioned in every workshop and one-on-one interview was poor signage, unattractive signage and lack of visual wayfinding. Signage issues occur in the following areas:

- I-5 Corridor
- County Department of Transportation controlled roads
- Townships Way Finding (e.g., Mountain Loop Highway Signs obscure and poorly placed)
- Crop Signage: In farm areas, there is either an absence of crop signs, too many crop signs or they are not integrated in appearance and thus confusing to travelers

Transportation was also an issue mentioned by virtually every survey respondent, including distance from SeaTac airport, lack of public transportation and difficulty in accessing east-west routes.

Fiscal and Management Issues: Collaboration, Communication and Marketing Gaps

Given Snohomish County's geography and diversity, a lack of collaborative communication and management strategies pose a barrier to tourism development. Securing cooperation, shared marketing and strategies, and staff updates are often not shared between the county, SVB, cities/towns and tourism providers. This lack of collaboration and coordination is then reflected in a non-integrated marketing strategy.

Technology Gaps

There is still a heavy reliance on print collateral in marketing and a lack of application development (“apps”) for Snohomish County Tourism. VICs are not using hand held technologies, touch screens and other computer generated technologies to help visitors with way finding and trip planning. Currently, Mobile Site is used by accessing the Tourism Bureau site and then clicking on it. This is harder to do on a Smartphone and cannot occur if there is no signal wherever you are. We recommend an independent product which does not depend on the Internet and uses an “app” downloaded to the hand-held device.

TOURISM TRENDS

Overview

Travel has changed in fairly significant ways in the last 10 years: older visitors are more physically active than in any time in history, seeking personal enrichment and exploration. Millennials (born in 1981 or later) expect technology access in tourism planning and have a strong interest in the environment. They are more likely to remain open to sharing information which is why they are an important part of tourism viral marketing.

In the United States, a mere 50% of households are traditional man-woman-children configurations, with a corresponding rise in women-led households and households with no children. We are a remarkably more diverse ethnic community, with over 48.4 million Latinos in the U.S., or 16% of our overall population (U.S. Census Bureau). For women with disposable income, this has led to a rise in women-only travelers. Travelers are more astute about tourism impacts on culture and the environment, leading to the explosive interest in sustainable tourism and related forms of nature-based travel, and Geotourism (Pew Research Center: internet, social trends, National Geographic Sustainable Destination Center).

Many of the trends profiled below are linked to an overall emerging trend in experience-based or learning travel which involves greater participation, authenticity, locally based, sustainable and specialized travel (*The Rise of the Creative Class*, Richard Florida). Travelers increasingly expect a blend of experiences that bridge wildlife and the cultural, contextual mosaic of that wildlife. Travelers are also seeking meaning and reaching out at a time of unprecedented worldwide unrest and conflict ([http:// www. travelagentcentral.com/home-based/adventure/first-quarter-report-adventure-travel-leaders-identify-five-2010-travel-trends-20827](http://www.travelagentcentral.com/home-based/adventure/first-quarter-report-adventure-travel-leaders-identify-five-2010-travel-trends-20827)).

What follows below is a snapshot of tourism trends that should be considered in Snohomish County’s tourism planning.

Flashpacking and Glamping

Camping is popular because it’s healthy, allows one to explore on foot (which reveals subtleties), and is usually quite reasonably priced. However, a growing trend is to make camping and backpacking more luxurious and comfortable. Flashpacking combines hotel stays with backpacking on either end of the trip while glamping usually involves luxurious camping in tents, sometimes accompanied by lambswool blankets, fireplaces and gourmet food and spa services. Glamping is short for “glamorous camping” and mimics African luxury eco-lodges while affording easy access to hiking, and beautiful natural areas nearby

(http://travel.sympatico.ca/RobinEsrock/Articles/travel_trends_2010.htm).

Technology for Travel

In line with broader technology trends, travelers are researching, booking and way finding through their hand-held technologies. Airlines, hotels and destinations are accommodating these trends and travelers are happily joining peer reviews of food and destinations. They are seldom getting lost because of the use of Global Positioning

Systems [(GPS) - (see http://travel.sympatico.ca/RobinEsrock/Articles/travel_trends_2010.htm).

Agritourism and Culinary Travel

We love our food. Cookbooks continue to be the number one type of books sold in the U.S. and there are currently over 6,100 farmers markets across the nation. The interest in locally grown food has burgeoned as policy issues such as childhood obesity, diabetes, rising medical costs, farmland conversion, urban renewal and locavore trends (eating primarily from local farms) move us in the direction of local food (USDA Agricultural Marketing Service, Food Network, USDA's "Know Your Farmer").

These trends point towards a positive and alluring direction for farm-based tourism, or agritourism, and culinary tourism, still a fairly under-developed form of niche tourism in the U.S. Washington State is the second largest premium wine producer in the U.S. If the appropriate context for Washington wine is supported by high quality lodging, restaurants, outdoor experiential tourism and spa services, this niche can form a primary focus of Snohomish County tourism development (UC Davis Small Farms Center, USDA Dept. of Agriculture and Resource Economics, Cascade Foothills Farmland Association).

Marian Marburg, CEO of Adventures in Good Company, writes, "We want to create a space where you feel supported in following your own agenda, whether that's to challenge yourself or to take some much needed R & R. It's your trip." This pandering to personal preferences resonates in a world of personalized cell phone rings, one's own music on iPods, and specialty coffee drinks. Some hotels offer each traveler a choice of pillow fiber and firmness, *iPod docks* with preloaded music and eight different spiritual texts (Overview of Tourism Trends, CTED, February, 2009).

The deliberate culinary traveler demographic is closely matched to the wildlife viewing demographic, or the "urban hiker," as we refer to these travelers in Washington State (Commerce 2008 Tourism Marketing Report). Of the entire leisure travel market in the U.S., 17% are deliberate culinary travelers. This market, as well as "opportunistic" culinary travelers, tend to have post-graduate degrees, spend roughly one-third of their budget on food-related activities and also enjoy shopping, historic sites, parks, nature, hiking and boating (in descending order: Travel Industry Association Profile of Culinary Travelers. 2006). As a result, they are a perfect focus for combined food/farm, heritage and nature based tourism itineraries.

Nature Based Tourism and Wildlife Viewing

Humans co-evolved in a natural setting and are hard-wired to respond positively to natural elements: animals, water, plants and light (Judith Heerwagen, UW, expert in biophilic design). Combined with the stressors of urban living and an increasingly technology-frenzied world, travelers are drawn to nature where they can immerse themselves in natural settings, view wildlife or engage in outdoor recreation. Washington State ranks 5th in the nation for revenues from viewing wildlife of all types, whether birding, using organized Audubon birding trails, attending festivals (Puget Sound Birdfest for example) or participating in painting/photography classes (Washington Department of Fish and Wildlife, Washington Audubon).

The nature-based and wildlife viewing traveler closely matches the culinary traveler in terms of income, affinity group memberships, education and clusters of related travel interests (WDFW, Strategic Viewing Plan for Watchable Wildlife, Mike O'Malley).

Nature-based tourism takes many forms from the reflective (meditation and yoga retreats outdoors) to the more active:

- Backpacking
- Biking

- Canoeing
- Camping
- Hiking
- Kayaking
- Snowshoeing, Skiing
- Visiting Parks or Walking
- Wildlife Viewing

Active outdoor recreation contributes \$730 billion annually to the U.S. economy and in Washington State, residents and visitors spent \$3.1 billion on wildlife recreation (includes hunting and fishing in addition to wildlife viewing. 2006 data, National Survey of Fishing, Hunting and Wildlife Associated Recreation for Washington). Of the cohort of nature-based travelers, 44% viewed wildlife, 39% engaged in trail activities, 36% camped and 32% bicycled (Outdoor Recreation Foundation).

Adventure Travel

A more “high octane” variation on nature based tourism; the active, outdoor adventure market has been rapidly increasing, with an almost equal number of women and men participating in all forms of adventure travel. Adventure travel includes high altitude backpacking, climbing, a wide range of water sports (kayaking, rafting, surfing), and, increasingly cultural immersion and volunteer trips (voluntourism). The market for adventure travel is significant and nearly half of the world’s adventure travel companies are based in North America. They, in turn, represent over 1.7 million customers (Adventure Travel Trade Association; *The Adventure Travel Market, 2009 Jordan Travel Mart*).

Sustainable Tourism

Sustainable tourism makes optimal use of environmental resources that help conserve natural heritage and biodiversity, respect the socio-cultural authenticity of host communities and provide socio-economic benefits to all stakeholders (World Tourism Organization).

From the tourist’s perspective, sustainable tourism should maintain a high level of satisfaction and ensure a meaningful experience that *raises awareness about* sustainability issues and promotes sustainable tourism practices.

Wildlife viewing, maritime heritage, culinary and wine tourism, conference green bid specifications, increase in nature based tourism, burgeoning corporate social responsibility (CSR) and environmental consciousness generally are major drivers of sustainable tourism. Intense development pressure is leading to the rapid decline of sacred places, open places and historical sites that are the backbone of tourism. People come to Washington for its natural beauty and this is almost the sole basis for formal marketing. (Calyx Sustainable Tourism).

TripAdvisor®, the world's largest travel community, has announced the results of its annual travel trends survey of more than 3,000 U.S. travelers. Thirty-four percent of U.S. respondents said they would visit an environmentally-friendly hotel or resort in the coming year, up from 30 percent in 2008. Thirty-two percent of those surveyed said they will be more environmentally-conscious in their travel decisions this year vs. 26 percent last year. (<http://www.travelmole.com/stories/1132365.php>).

Voluntourism

Volunteer travel is one of the fastest growing segments in the travel industry. According to a recent article in Time magazine, the number of volunteers in the year 2005 was 65.4 million and is expected to reach 75 million in the year 2010 (<http://www.travelmuse.com/articles/general-features/family-voluntourism> and http://www.brandweek.com/bw/content_display/news-and-features/incentive/e3i2d2992c8dfe0a898b80f7142acad2177).

Traveling to volunteer and give back to host communities helps visitors travel in alignment with their values and personal goals (Marian Salzman, Euro RSCG Worldwide PR). Some voluntourism trips require special skills and take commitment and personal expense. Many others require no skill at all, just willing hands and warm hearts. In the U.S., areas that have experienced disasters are sites for voluntourism. This is particularly true of New Orleans and the Gulf Coast. Find a list of quality organizations here on the [New Orleans Institute's partner sites](#) or on the convention bureau's [voluntourism opportunities in New Orleans](#) page.

Over 50 Active Travel

As baby boomers age and remain in relatively good health, travelers 50 and over are traveling extensively, have disposable income, and are interested in active, learning vacations. In many instances, they are traveling to places where they may consider retiring. Baby Boomers currently make up 28% of the American population and four million of them are turning 50 each year. This market favors itineraries and good value package vacations. Perhaps surprisingly to the Millennials, most over 50 travelers use the Internet to book travel as well (<http://seniorjournal.com/Travel.htm>), (<http://over50andinmyprime.wordpress.com/2010/09/02/holiday-and-travel-trends-for-the-over-50s/>).

According to a survey by Alliance & Leicester, one fifth of those polled see turning 50 as an opportunity to try new and exciting challenges.

Over 50 travelers also comprise a high percentage of the adventure travel market. According to the 2006 Adventure Travel Industry Survey, Practices and Trends, released by the Adventure Travel Trade Association (ATTA), 41- to 60-year-olds comprise the highest participating age group in adventure travel, at 42.2 percent. Add in those older than 60 and the total jumps to more than 61 percent.

Women Only Travel

Significant shifts in household demographics, income distribution between men and women and adventure travel interests for women have created a distinct women-only travel market. In some cases, travel is specialized local travel for groups of women traveling as friends or family. Women's adventure travel is currently a \$100 billion business worldwide (The Oregonian). Also, women often feel safer traveling with other women (<http://www.travelinggreener.com/trends/top-5-womens-travel/>).

Industry experts have identified the following trends for women-only travel:

- Learn something new or improve a skill (experiential trips)
- Get fit and get active (adventure and nature based trips)
- Lend a hand while experiencing something exotic (voluntourism)
- Discover America's greatest treasures
- Traveling exclusively for the "Bucket List". (<http://travelgreener.com/trends/top-5-womens-travel/> and Adventure Women).

Other benefits of women-only travel are less guilt. Women are more easily able to let go of work and family obligations when with a group of like-minded women friends recharging their batteries. They forgo checking in with the office, and can better enjoy personal relaxation. This is natural corollary to being freed from obligations to care for others (Washington State Department of Commerce, 2009 Overview of Tourism Trends and http://www.tc.gov.yk.ca/pdf/American_Express_Travel_Agent_Poll_Finds_New_Trends_in.pdf)

Short Trips and Integrating Family and Friend Travel (VFR)

The Travel Industry Association (TIA) reports in that during 2007, nearly 30 percent of Americans took five or more weekend trips. Traveling to visit friends and family is referred to as VFR travel and constitutes a healthy percentage of travel in the U.S. Visiting cities, small towns, beaches, mountain and lake areas or parks are the most popular tourism attractions. VFR travel is also an excellent way to integrate the host community into tourism as tourism ambassadors (Commerce Overview of Tourism Trends; *VFR Travel- the forgotten tourism marketing opportunity*. University of Ballarat, Elisa Backer, 2008).

In Snohomish County, the VFR market is a highly leveragable market because local residents can then be used to take visiting friends and relatives to experience Snohomish County rather than experiencing leakage to points south and north. This approach also dovetails very well with using residents as tourism ambassadors in the context of conducting more community based tourism planning in the future.